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Trade and Industry

25 August 1978

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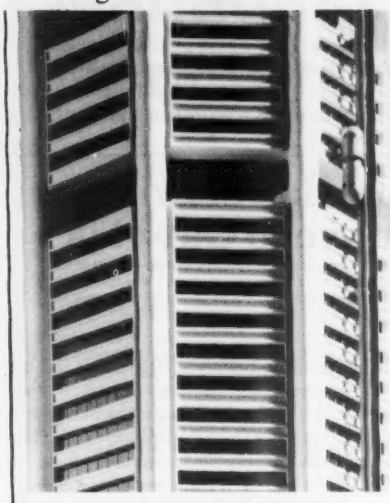

British architects, consulting engineers and quantity surveyors are helping to build this new landmark in Cairo. The Petroleum Tower is one of many overseas projects where British design expertise is much in demand (see page 450).

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Trade and Industry this week

HOME

Anglo-Japanese tv venture assisted by government

Government assistance of £1.95 million for a joint tv manufacturing venture between Rank Radio International Ltd and Toshiba (UK) Ltd was announced on Wednesday (23 August) by Alan Williams, Minister of State for Industry. A joint manufacturing company called Rank Toshiba Ltd is to take over Rank's factories in the west of England and will come into operation on 1 November.

The two companies will be working together to modernise Rank Radio's existing facilities at Plymouth and Redruth where nearly 3000 people are employed in the manufacture of colour and monochrome television sets and audio equipment. The modernisation will considerably strengthen the company's position and ensure a sound future for the employees in these two factories.

Welcoming the project, Mr Williams said: 'This deal follows lengthy discussions between the two companies and talks which I held with Toshiba in Japan last April. It is an excellent example of the joint-venture approach which I have been urging Japanese companies to consider when planning inward investment in this country. It is a good example of foreign investment actually adding to job-security in Britain – an important factor for Plymouth and Redruth.'

Government assistance will be in the form of an interest relief grant under section 7 of the Industry Act 1972. The venture is in line with the Industrial Strategy objectives the government is seeking to achieve for the UK consumer electronics industry. It will strengthen an existing production base without creating further significant capacity aimed at the home market.

Benefits are expected for the UK components industry. There is also expected to be a net saving in balance of payment terms from import substitution. Where possible, the joint company will supply substitutes of Toshiba imports of colour tv sets.

Jobless total up this month

Unemployed persons in Great Britain, including school leavers under 18, numbered 1 534 441 on 10 August, representing 6.6 per cent of the total number of employees. This provisional figure shows an increase of 21 954 (0.1 per cent) over the figure for the previous month.

The seasonally adjusted series shows that the number of unemployed in Great Britain excluding school leavers was 1 330 900 (5.7 per cent of all employees), an increase of 20 900 since 6 July. In the last three months there has been an increase on average of 8 000 a month.

Of the total unemployed in Great Britain, 250 000 had been unemployed for four weeks or less. It is estimated that about 1 160 000 were unemployed for more than four weeks, and were aged under 60.

The average number joining the unemployment register in the three months ending July was 391 000 per month compared with 358 000 in the three months ending April and 358 000 in the three months ending January 1978. The average numbers leaving the register in these three periods were 394 000, 375 000 and 357 000 per month respectively.

The average inflow of vacancies in the three months ending July was 229 000 per month compared with 213 000 in the three months ending April and 195 000 in the three months ending January 1978. The average outflows in the three periods were 231 000, 203 000 and 185 000 per month respectively.

British Shipbuilders' books reflect recession

British Shipbuilders' returns for the second quarter of this year again emphasised the acute shortage of new work throughout the world. Yards within British Shipbuilders completed 17 merchant ships of 230 985 tons gross, compared with nine ships of 143 378 tons gross in the same period of 1977. The completions over the first six months of the year were 30 ships of 385 453 tons gross as against 24 ships of 304 891 tons gross in the same period of 1977.

In the second quarter of 1978, orders were received for three merchant ships totalling 2150 tons gross and valued at £6.4 million. None was for overseas registration. In the second quarter of last year, the order intake was seven ships of 203 000 tons gross valued at £77 million. One vessel of 128 000 tons gross was for overseas registration.

The total order bookings for the first half of this year were 12 ships of 77 440 tons gross compared with 16 ships of 297 735 tons gross in the same period of 1977.

At 30 June 1978 the total merchant ship order book of British Shipbuilders stood at 118 ships of 1 231 202 tons gross valued at £723 million. Of this, 53 ships of 627 108 tons gross were for overseas registration and worth £352 million.

Iberian services move to Gatwick

All air services between Heathrow and the Iberian peninsula (Spain, Portugal, their associated islands and Gibraltar) will be transferred to Gatwick from 1 April next year. This government decision was announced on 23 August and has been conveyed to the governments and airlines concerned following consultations with those governments and British Airways.

Consideration is also being given to further possible transfers of traffic to and from Canada and the Scandinavian countries.

There is already a significant volume of traffic between Gatwick and Spain and Portugal on charter operations, and with the Spanish and Portuguese-speaking world through the scheduled services of British Caledonian and Avianca. The transfer from Heathrow to Gatwick of the Iberian services of British Airways, Iberia, TAP and Gibair will represent a large block of traffic and is in line with the government's policy of re-distribution of traffic between London's two major international airports.

Plastics advisory service suggested

One of the principal recommendations made in a report on the south Wales plastics processing industry is for the industry to have an advisory consultancy service. The report, published on Monday, also recommends that a centre of excellence in mould and die-making technology should be set up, and that the status of the Nedo plastics steering committee should be enhanced. This has, in fact, since happened with the establishment of the plastics processing sector working party under the government's Industrial Strategy.

'Towards a strategy for the plastics processing industry', available from the Department of Industry, price £3, investigated the problems and performance of this industry in south Wales which is considered typical of the UK.

The aim is to deduce lessons relevant to the national industry from the regional study.

Chairmen and Managing Directors

The following executives are seeking to further their careers within fields where proven experience counts and is rewarded accordingly

FINANCE

1. **Cost Supervisor.** BSc (Hons) Economics and statistics. An impressively bright young member of a substantial cost analyst team seeking further career development. **Age 23 Salary circa £8,000**

2 **Audit Senior.** ACA good French. After eight years professional international experience – including computer auditing – he now wishes to move into commerce or industry further to progress his career. **Age 27 Salary £7,500**

3 **Corporate Planner** BSc. Hons. MA business analysis. Thoroughly practical with a wide range of computer user and consultancy experience in management services, including overseas. Seeking further career development. **Age 28 Salary £6,500+**

4 **Treasurer.** AIB. Fluent French good German. An intelligent young executive with merchant banking, accountancy and treasury experience covering a wide range of international industrial and financial services in textiles, oil and banking. Seeking career development. **Age 28 Salary £7,500+**

5. **Finance Manager.** ACMA. BSc (Elect Eng). Fluent German. A most impressive senior executive with substantial technical and manufacturing experience (including general management) in Europe. Having recruited his German successor he now wishes to develop his own career in the engineering or computing industries. **Age 31 Salary £10,000+**

6. **Financial Controller.** FCA. Controlling the £65 million turnover of the subsidiary of a major international manufacturing group consisting of numerous small companies. Promotion blockage, seeking career development with greater scope. **Age 36 Salary £11,000+**

7. **Finance Manager.** BSc (Econ) ACA. MBA (INSEAD) distinction. Fluent French and German. A highly intelligent large group executive with international professional and manufacturing experience. Location very flexible. **Age 33 Salary £10,000+**

8. **Merchant Banker.** BA(Cantab) Law MBA (IMEDE). Good French with substantial legal and banking experience in Australia and Europe. Seeking a move into industry which could lead towards general management. Location flexible. **Age 35 Salary circa £12,000**

9. **European Controller.** BBA. CPA. An experienced international especially in large scale retail and shipping operations. Wishes to remain London based. **Age 35 Salary circa £18,000**

10. **Financial Manager/Secretary.** C.A. (Portugal) BAM. Fluent French, Spanish, Italian, Portuguese, English. An experienced corporate financial manager and consultant. Location flexible. **Age 40 Salary £10,000+**

11. **Finance Director.** FCA. Fluent Portuguese, good French, some Spanish. With sound manufacturing company experience in Kenya and Portugal. Seeking a career development with a larger company. **Age 38 Salary £10,000+**

12. **Divisional Accountant.** ACCA. ACMA. A vigorous financial manager with wide international experience of building and construction contract management for the major groups. Seeking a further overseas contract. **Age 55 Salary circa £16,000**

MARKETING

13. **Area Manager.** Fluent French, German and Spanish. A most successful international sales manager in the food and drink industries with responsibility for Scandinavia, E. Europe and Caribbean. A determined and articulate high-flyer seeking greater responsibility with a more abitious company. **Age 22 Salary £6,000+**

14. **Export Salesman.** BA (Oxon). Fluent German good French, some Russian. Well educated, intelligent and articulate he has successfully opened up a new market in Germany for a small company. Now wishes to expand his experience. **Age 25 Salary £6,000+**

15. **Export Salesman.** Fluent German, French and some Cantonese. Successful experience in selling office and reprographic equipment to Scandinavia, Middle East and Australia. A sound steady export salesman who wishes to improve his remuneration. **Age 26 Salary £6,000**

16. **Export Salesman.** MA (Cantab) Hons. MBA. An intelligent and ambitious young man with 3 years experience in retail, food and grocery sales. Seeking career development. **Age 26 Salary £6,000+**

17. **International Marketing Executive.** BSc (Hons) Sciences. MSc Business Admin. Fluent Hungarian. Good French. A 'high flyer' with six years sound international marketing and consultancy experience in high technology and heavy industry, now seeking a progressive line appointment. **Age 28 Salary £13,000+**

18. **Sales Director.** MA. Good French. 1st Hons. Nat. Sciences. Impressive record in international sales of engineering products, especially automotive. Promotion blockage, seeking career development in engineering leading towards general management. **Age 31 Salary £16,000**

19. **Regional Manager Export.** BSc (Prod. Eng). Bilingual French. Considerable sales engineering experience of capital equipment in the mining type of industries in Europe and Scandinavia. Seeking greater responsibility in either a French or British company. **Age 39 Salary circa £12,000**

20. **Sales/Marketing Director.** BSc (Hons) Elect Eng. MBA. Some French and German. With substantial sales experience in both manufactured and service products. Recently reorganised a large sales force. As a high flyer he now wishes to progress his own career in either the durable or service industries such as computer time sharing. **Age 29 Salary £8,500+**

21. **General/Marketing Director.** A highly intelligent and most likeable senior executive whose wide range of sales management experience covers automotive products in Europe, building services, the leisure industries and glass. Seeking career development and increased remuneration. **Age 35 Salary £12,500+**

22. **Export Sales Director.** An experienced and successful record in fast moving consumer products such as foods, toys, electrical goods to worldwide markets. Seeking further career development. **Age 42 Salary £12,000**

23. **General/Sales Manager.** BA (Oxon) Hons. Chem. Good French. A tall and most impressive area manager with an excellent understanding of man management in a major international sales and manufacturing company. Wishes to develop his career into general management. **Age 36 Salary £10,000+**

GENERAL MANAGEMENT

24. **General Manager.** MA Eng. Sciences. MSc. An impressive and practical manager with experience in the freight, travel and leisure industries and four years in electric motor production. A dedicated profit orientated businessman seeking further career development probably within a large group. **Age 33 Salary £12,500+**

25. **Corporate Planner.** BA (Econ) Hons. MSc (OR and MS). Fluent French, good German. A highly numerate and intelligent executive with large scale marketing and distribution experience and as an internal and external consultant. Seeking further career development. **Age 28 Salary £11,000+**

26. **International Executive.** BSc (Hons) Sciences Dip. Business Admin. Has 12 years experience in two major worldwide manufacturing groups involving funding and planning for 25+ operations in numerous countries. A highly practical head office man with a good science degree. Seeks greater responsibility leading towards general management. **Age 29 Salary £11,000+**

27. **Production Manager.** BSc (Eng) MSc (Chem. Tech), Dip IR. A highly successful man with four years in fmcg production and five years in steel plate. Promotion blockage – seeking career development ideally in consumer products or process industries. **Age 28 Salary £10,000+**

28. **Electrical Design Engineer.** BSc. With worldwide experience in the provision of electrical services up to 200 MW for the mining process and contracting industries especially in Africa. Seeking career development towards project management. **Age 29 Salary £7,500+**

29. **Business Development Manager.** An impressive highly numerate manager with major manufacturing group experience over five years in policy planning for products, manufacture, pricing and new business in the automotive related industries. Promotion blockage. **Age 31 Salary £8,500+**

30. **Young Manager.** BA (Business Studies), MSc. Highly numerate with experience of venture capital management and all forms of auditing. An impressive 'team leader' with sound commonsense and an excellent appreciation of 'man management'. **Age 30 Salary £8,500+**

31. **Senior Project Engineer.** MIPHE. MRSH. HOP. A tough and experienced water engineer for large and small projects in the Middle East and Africa. Seeking increased remuneration, ideally overseas. **Age 35 Salary circa £10,000**

32. **Personnel Manager.** BA(Oxon), MIPM. Large group experience includes management development, training and performance appraisal. Wishes to become more closely involved in the toughest type of I.R. areas to widen his professional skills. **Age 41 Salary £10,000**

33. **General Manager.** BSc Civil Eng. MICE C. Eng. LLB. MBA. Fluent French and Italian. An experienced large group engineer with management experience in the Gulf, Libya, Malaysia and UK. **Age 37 Salary £10,000**

34. **General Manager** (Shipping). Fluent Dutch and French, good German. 12 years experience of shipping and transport management for major group operating in Far East, Africa, Middle East. Wishes to be based in Europe. **Age 34 Salary £15,000**

NOTES
(i) All the above executives have been interviewed by us and we consider them to be high quality material in their particular range – there are several others whom space precludes.

(ii) If you require an executive of similar capability please contact me.

(iii) If you yourself feel that you match these standards and might benefit from a new opportunity please contact me in the strictest confidence and without any obligation.

Robin R. Whalley

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Home news

Compensation of £14m for Austin and Pickersgill

Compensation under the Aircraft and Shipbuilding Industries Act 1977 has been agreed for the unquoted securities of Austin and Pickersgill Ltd. Agreement was announced by the Department of Industry and Mr E. R. Nicholson of Peat, Marwick Mitchell and Co, the stockholders' representative, on 16 August.

The compensation is £14 million. Payments on account amounting to £5.5 million towards this total were announced in January and July 1978.

. . . and £60m for Hawker Siddeley

Compensation under the same act has also been agreed for the unquoted securities of Hawker Siddeley Aviation Ltd and Hawker Siddeley Dynamics Ltd.

In a joint announcement of 15 August, the Department of Industry and Sir John Lidbury of Hawker Siddeley Group Ltd, the stockholders' representative, said that the total compensation was £60 million. A payment on account of £3.1 million towards this total was announced on 25 January.

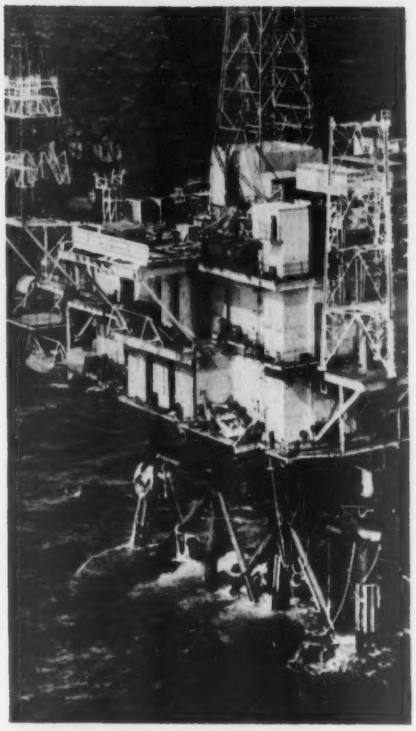
National energy bill tops £16 billion

Over £16 billion was spent on energy by the UK in 1977. This works out at about £44 million a day. It represents an average of nearly £290 a year for every man, woman and child in the country – four times more than a decade ago. Over 30p in every pound (including taxes) went on road transport fuels. These figures are shown in the Department of Energy's 'Digest of United Kingdom Energy Statistics 1978' (HMSO, £7.50).

The UK produced the equivalent of 264 million tonnes of coal last year, almost three-quarters of the country's primary fuel requirement. Crude oil and natural gas from the North Sea together accounted for nearly half of total UK energy production.

The country used the equivalent of 338 million tonnes of coal in 1977, an increase of nearly 9 million tonnes (2.6 per cent) over the previous year. Higher consumption of natural gas accounted for nearly half of this increase in fuel use. Coal consumption rose only slightly and petroleum deliveries increased by 1.7 per cent. Primary electricity (nuclear and hydro) increased by 10 per cent.

The digest contains 100 tables and seven pages of graphs and maps which, with extensive notes, present a comprehensive account of UK energy resources and demand during the last 10 years. Separate sections are devoted to individual fuels or particular subjects such as fuel prices, foreign trade in fuels and oil and gas resources.



Crude oil and natural gas from the North Sea together accounted for nearly half of total UK energy production in 1977.

Tables and charts showing consumption by final users illustrate the changing pattern of consumption of the different fuels by principal consuming sectors and by main industrial groups. Other tables show the relationship between energy consumption and the gross domestic product. Six new tables have been introduced this year including three in the petroleum section which provide an analysis of the supply and consumption of individual petroleum products and hitherto unpublished details of stock levels.

Benn announces barrage committee members

Tony Benn, Secretary of State for Energy, announced 18 members of the new Severn barrage committee on 17 August. The committee is to advise and assist in reaching a decision on whether to proceed with a scheme for harnessing the tidal energy of the Severn estuary.

Sir Herman Bondi, chief scientist, Department of Energy, chairs the committee and appointments are in a personal capacity. The 18 members so far appointed are: Brian Bailey, Geoffrey Binnie, Walter Bor, W. P. Davey, Professor Ronald Edwards, Professor Sir Hugh Food, Captain R. A. Gibbons, J. C. Heywood, Don Jones, John Jukes, Sir Alec Merrison, Rhodri Morgan, Arthur Palmer, J. G. Quicke, T. M. Haydn Rees, Graham Saunders, Gervas Walker, Sir John Wills Bt. A few further appointments will be announced shortly.

The setting up of the committee was announced in the government white paper, 'The development of alternative sources of energy' (Cmnd 7236), published in June.

The government has provisionally allocated £1.5 million for further studies relating to a Severn barrage scheme but wishes to have the advice of the new committee before commissioning them. The first meeting is expected to take place in September or early October.

British Gypsum to limit price increases

Increases in the price of gypsum-related products other than carriage charges for plasterboard are to be restricted to a maximum of 6½ per cent until 23 March 1979.

This undertaking, which Secretary of State for Prices and Consumer Protection Roy Hattersley has accepted from British Gypsum Ltd, follows a report by the Price Commission on its investigation into price increases proposed by the company for its plasterboard, industrial plasters, and other gypsum-based products.

British Gypsum is the sole UK manufacturer of gypsum plaster and plasterboard. The commission recommended that the overall increase of 8 per cent proposed should be restricted to 6½ per cent until 23 March 1979 (12 months after the original notification of the increase) but accepted that the notified increase of 15.2 per cent for the carriage of plasterboard was justified.

Representatives of British Gypsum and its parent company, BPB Industries, have discussed the commission's report with Mr Hattersley. While accepting most of the commission's factual findings, they expressed reservations about the recommended restriction, which they considered was not fully justifed by the commission's arguments. After discussion, however, they agreed to offer an undertaking to comply with the recommendation. Mr Hattersley has accepted this undertaking and welcomes the company's co-operation.

NEB and ICFC support Blackburn venture

The National Enterprise Board (NEB) and Industrial and Commercial Finance Corporation Ltd (ICFC) are jointly investing in

BTB (Engineering) Ltd, manufacturers of specialised three-wheeled vehicles marketed under the name ANT. The venture is also receiving a Department of Industry interest relief grant.

NEB and ICFC have subscribed for 60 000 redeemable cumulative participating preference shares of £1 at par (£30,000 each). The preference shares carry the right to subscribe for 5000 £1 preferred ordinary shares at par which will give NEB and ICFC 25 per cent of the enlarged ordinary share capital. Robin Bendall, managing director, and the two other full-time directors presently hold all the exising issued ordinary shares.

Over the last four years, BTB has successfully developed and marketed a range of specialised bodies for municipal and other uses which are predominantly used in refuse collection and waste-disposal and have been mounted on a three-wheel, four-cylinder engine chassis. More then 50 per cent of the present output is exported.

The opportunity for BTB to establish the full assembly unit in Blackburn has arisen from the demand from municipal authorities at home and abroad for small environmental equipment. The rugged construction and four-cylinder engine used in the ANT, together with the purpose-built bodies and ease of maintenance, make the ANT ideal for use in areas such as the Middle East and Africa.

The new manufacturing unit, which could eventually employ approximately 50 people, has been established in a factory made available by Blackburn Corporation.

Work starts on Bootle factories

Work has started on two advance factories for the Department of Industry on the department's new site in Brasenose Road, Bootle, Merseyside. These factories are of the terrace unit type, and each totals about 1260 m² and is capable of division into four individual units. The premises should be ready for occupation by March next year.

Inquiries about leasing should be addressed to Mr C. Giles, Department of Industry, North-West Region, Sunley Building, Piccadilly Plaza, Manchester M1 4BA, tel. 061-236 2171 ext. 646.

. . . and on new industrial estate in Yorks

Site work has started on the Ainleys industrial estate, Elland, Calderdale, west Yorkshire which is being developed for the Department of Industry.

The work will consist of the forming of level plateaux and the provision of associated drainage. This should be completed by the end of October to allow factory building to start in November. Service roads will be provided in the main building contract.

The Department of Industry has already authorised three advance factories to be built at Elland. One is a unit of 450 m², the second is of 900 m² and the third is a block of four terrace units totalling 900 m².

New factory for small firm

Mr P. R. Huntley and Mr G. C. Treloar, two directors of RAM Engineering Supplies, which recently moved to a Development Commission advance factory at Threemilestone industrial estate, Truro, Cornwall. The company specialises in the production of gaskets, joints and washers in all types of non-metallic materials. It was formed four years ago by Mr Huntley, and now employs six full-time people and five part-time workers, with the prospect of employing a couple more people later on.

For any further information contact Mr J. Derbyshire, Regional Manager, English Industrial Estates Corporation, 25 Silver Street, Doncaster, tel. 0302 61560.

Advance factories for Wallasey and Liverpool

Work is about to start on the four advance factories for the Department of Industry on the department's new site in Dock Road, Wallasey, Merseyside. Two of these factories are of about 1350 m² each and the other two are of about 2100 m² each. The premises should be ready for occupation by September 1979.

Work is also about to start on three advance factories for the Department of Industry on the department's new site in Grain Street, Liverpool. These factories are of the terrace unit type, one has a total area of about 1600 m² capable of division into five individual units, another is approximately 1900 m² in total and can be divided into four units and the third totals about 1100 m² and can be divided into two separate units. The premises should be ready for occupation in June next year.

Inquiries about leasing should be addressed to Mr C. Giles, Department of Industry, North-West Region, Sunley Building, Piccadilly Plaza, Manchester M1 4BA, tel. 061-236 2171 ext. 646.

. . . and for Durham and Oswestry

Work has started on a block of four advance factory terrace units totalling about 900 m² for the Department of Industry on the Leadgate industrial estate, Co. Durham. The premises should be ready for occupation in March next year.

Inquiries about leasing should be addressed to Regional Director, Department of Industry, Stanegate House, Groat Market, Newcastle upon Tyne NE1 1YN, tel. 0632 24722.

Work is soon to start on a 1350 m² advance factory for the Department of Industry and a 450 m² advance factory for the Development Commission on the Mile Oak industrial estate, Maesbury Road, Oswestry, Salop. The premises should be ready for occupation by May 1979.

Inquiries about purchase or lease should be addressed to Regional Director, Department of Industry, West Midlands Region, Ladywood House, Stephenson Street, Birmingham B2 4DT, tel. 021-632 4111.

Environmental bibliography of Wales

Publication of an environmental bibliography of Wales, probably the first of its kind in the world, was announced by Secretary of State for Wales John Morris on 14 August.

An environment protection unit was set up in the Welsh Office in 1972 to act as the focus for professional and administrative expertise on pollution problems. The collection of published papers and these on environmental science recorded by the unit has now been brought together in the bibliography, which contains nearly 4000 references from over 300 journals. It covers the period 1900 to 1976 and includes all aspects of environmental studies relating specifically to Wales.

References covered

References covered range from the effect of sonic booms on breeding seabirds, lead pollution in mid-Wales, and the natural history of Llangorse lake to studies on the polecat in Wales and the distribution of cancer in the principality. The bibliography – 'Environmental bibliography of Wales' (HMSO, £28) – also contains references to some localities outside Wales, particularly the marine areas including the Severn estuary, Bristol channel, Celtic sea, Irish sea and Liverpool bay.

Gramophone records exempted from origin marking

Decorative sleeves of imported gramophone records supplied under a UK name or mark will no longer be required to bear an indication of the country of origin from 1 September. This will be the effect of directions made by Secretary of State for Prices and Consumer Protection Roy Hattersley under the Trade Descriptions Act 1972.

Premium relief by deduction on life assurance

Following the introduction of a new system ('premium relief by deduction') for relief on life assurance premiums, from 6 April next year, the Board of Inland Revenue has made regulations covering the scheme for reimbursement of 'deficiencies' to life offices. Life office includes, where appropriate, a registered friendly society or association of underwriters carrying on life assurance business.

The central features of the new system are that: relief will normally be allowed without the intervention of a tax office. Any individual who pays a premium on which relief is due will be entitled to deduct and retain an appropriate sum for relief, which has been fixed at 17½ per cent for 1979/80, from the amount of the premium.

Secondly, the Inland Revenue will reimburse the life office the 'deficiencies' in its premium receipts. Tax offices will be involved only when some circumstance has led to over-or-under-allowance of the relief under the deduction system.

The regulations are contained in SI 1978 1159, published on 15 August.

Merger proposals cleared

Secretary of State for Prices and Consumer Protection Roy Hattersley has decided on the information at present before him not to refer the proposed merger between the Bowater Corporation Ltd and Crossley Building Products Ltd to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Proposed BP merger

Roy Hattersley has decided not to refer the proposed merger between BP Oil Ltd and Robert McBride (Middleton) Ltd to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Proposed NED acquisition

Mr Hattersley has also decided not to refer the proposed acquisition by the National Enterprise Board of a 29.91 per cent shareholding in Negretti and Zambra Ltd to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977, the register was noted 'licences of right' in respect of the following patents on the date specified:

8 August 1978
1329078 International Standard Electric Corporation
Tacan antenna system
1347124 International Standard Electric Corporation
Bearing measuring system
1375680 International Standard Electric Corporation
Antenna array arrangements
1391549 International Standard Electric Corporation
Improvements in colour TV receivers
1441624 International Standard Electric Corporation
Sound-signal receiver with a electro-static microphone
1289778 Raymond Baterman
Apparatus for storing fishing line
1459729 Raymond Baterman
Apparatus for storing fishing line
1007576 H. Knaust (deceased) and Dr Ulrich Von Kritter
Improvements in or relating to endless conveyors
1423268 EMI Ltd
Improvements relating to sound reproducing apparatus
1444348 Dr Radomir Gaspar
Rotation page finder

Any person who claims that the proprietor of the patent is, and was, at the time of the entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davis, Comptroller

Government sales

Sales by auction

6 and 7 September 1978 – Miscellaneous stores

Location:
Top Rank Suite, Banister Road, Southampton

Auctioneers:
Austin and Wyatt (Dept L), 79 High Street, Fareham, Hants (0329 234211)

Stores lying at depots in south of England including clothing and textiles, furniture, machine tools, charging sets, diesel engines, electrical and MT spares, tyres, trolley jacks, 15 tonne mobile crane and other items.

12 and 13 September – Miscellaneous stores

Location:
Ordnance Storage and Disposal Depot, Ruddington, Notts

Auctioneers:
Arnold and Son (Dept L), 13 Market Place, Burton-on-Trent, Staffs (0283 64657)

Aircraft components and ground equipment, MT, electrical and electronic equipment and spares, furniture, textiles, tyres, machine tools, binoculars, watches, photographic equipment, wooden and metal boxes and a large collection of other miscellaneous items.

Catalogues, which give details of the lots, conditions of sale, viewing times etc, are available from the auctioneers from two weeks before and up to the day of sale, price 40p, postage 15p.

WEMBLEY AUCTION SALES 1978

5 September 1978

View Days:	Day preceding and morning of sale
Location:	Department of the Environment Property Services Agency Supplies Stores India Pavilion Exhibition Grounds Wembley, Middx. Tel. 01-903 2508
Description of Goods:	Miscellaneous office equipment and furniture etc. (Potential buyers are advised to refer to the official catalogue available from the auctioneers, price 20p.)
Auctioneers:	Messrs Hollingsworth Westcombe House 56/58 Whitcomb Street Leicester Square London WC2H 7DR Tel. 01-839 1875

Technology news

Over £40m spent on understanding environment

Expenditure on research and development by the Departments of the Environment and of Transport during 1976/77 was £40.5 million. Spending on the research programme for 1977/78 is provisionally expected to be £41.3 million, which represents a small decrease in real terms over the previous year. This research, done in order to improve understanding of the natural and the built environment of Britain and of the effects and effectiveness of human actions, is described in the 'Report on research and development 1977', published on 14 August and available from HMSO price £2.25.

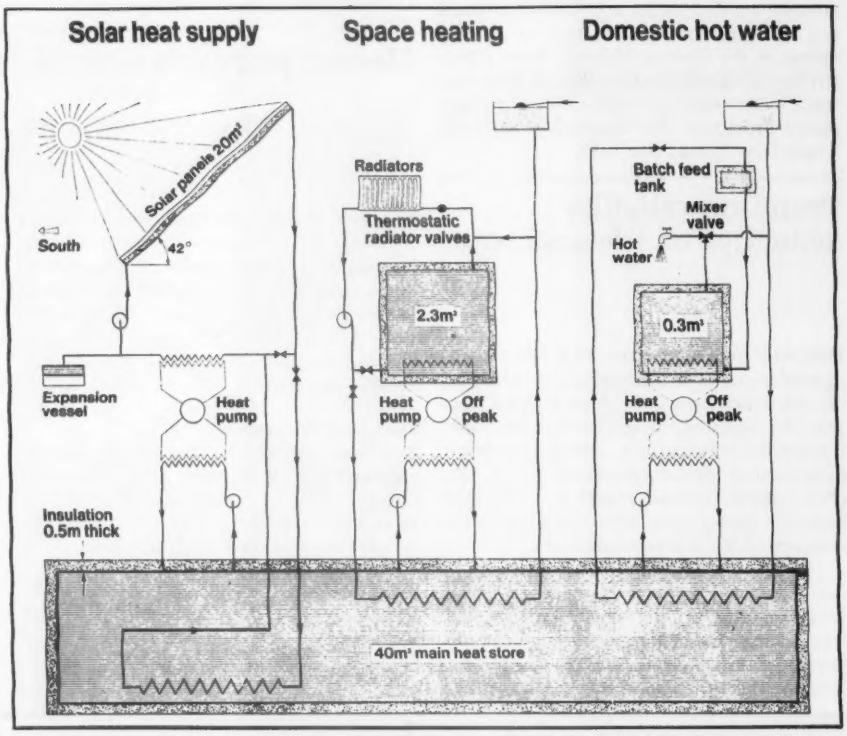
Of the total for 1976/77 £25.8 million was for environment and £14.7 million for transport. This included spending of some £6.6 million on work for outside agencies and on support for external research organisations.

Housing, building and construction accounted for over 40 per cent of environment research expenditure. About 33 per cent of research was concerned with the provision of wholesome water supplies and the protection of people and environmental systems from chemical and physical pollution. Around 25 per cent was devoted to planning, the appraisal of mineral resources, and the countryside.

Roads and bridges took up 30 per cent of the transport expenditure. Even if there is less road construction in the future, maintenance will remain a major expense and research is therefore being increasingly focussed on this subject. Road safety accounted for 17 per cent of expenditure, rail and inter-urban transport 19 per cent, and urban transport planning 18 per cent.

About half of the research programme was done or supervised by the departments' three research laboratories, the Building Research Establishment, Transport and Road Research Laboratory and Hydraulics Research Station. The other research was carried out by other government, research council and university centres or by consultants under contract to the departments.

The report includes short articles on some particularly important research. At the Building Research Establishment solar panels, heat pumps, insulation and ways of reclaiming heat from waste water are being explored in three experimental houses: all three should use only one third of the heat energy of a normal house. A new division is examining how to reduce the risk of collapse in buildings. At the Fire Research Station, part of the Building Research Establishment, attention is focussed on domestic fire fatalities, and it has shown that house contents are more of a hazard than house structures.



The service system of an experimental solar house being built at the Building Research Station to study some of the techniques which can contribute to energy savings. About one-third of the space and water heating energy of a comparable modern house should be saved by the system. A further one-third could be saved by a high level of thermal insulation.

The Transport and Road Research Laboratory is studying the stresses bridges are likely to sustain in a working life of over 100 years, and seeking ways of avoiding fatigue failure. The laboratories' work on road maintenance is showing how to reduce the amount of bitumen – the most costly component – in road surfaces without making them more likely to break up. The report summarises other work on traffic management, including a computer model for easing traffic flow through complicated road systems. Hydraulics Research Station work on how to prevent the undermining of the new Thames barrier by local erosion is described, alongside other work on coastal protection and estuarine pollution.

A 1:50 scale model of the Thames flood barrier being used at the Hydraulics Research Station to find out for the consultants to the Greater London Council how best to protect the river bed around the barrier.

The report summarises five studies sponsored by the departments. One is on how far the UK's needs for transport may be altered by telecommunications. Another programme is on the development of lightweight, high-power, advanced batteries suitable for future road and rail transport. Other summaries cover major studies of pollution from waste tips, the ecology of estuaries, and tenant participation in housing management.

All three research establishments have substantial programmes of work on behalf of developing countries, much of it sponsored by the Ministry of Overseas Development. Building research is especially concerned with building and construction in tropical conditions, including earthquake zones. Trans-

port research has concentrated on transport planning and operations, and on road construction and safety problems, which are vital to successful economic development in the third world. Hydraulics research has continued a series of major hydraulics studies – essential, for example, for the creation or expansion of overseas ports – in many cases in support of British firms who secured exported contracts. The work of all three laboratories contributes to British prosperity by aiding contractors and consultants in their work abroad and by avoiding unnecessary imports through making better use of resources at home.

More effort is being put into research strategy because even the most applied research needs to draw on basic scientific knowledge, and the day-to-day problems the departments face can only be solved by broadly-based expert teams. The users of the departments' research include local government and the construction and water industries. The departments are exploring fresh ways of obtaining their advice on the programme.

NMR provides safe view of living organs

Nuclear magnetic resonance (NMR) imaging is a technique that allows scientists to build up detailed pictures of the structure of living organs without the use of X-rays or radioisotopes. At the University of Nottingham a department of physics research team has developed Britain's first whole-body NMR imaging apparatus. Live whole-body thin cross-sectional line scan images can be obtained. Different colour levels in the image reveal the various organs and bone structure.

The apparatus works by magnetically polarising a subject in a large electromagnet. The mobile protons contained in the water, fat and oil distributed throughout the soft tissues and organs of the body naturally give rise to a weak magnetic polarisation. The magnet affects these so that, when radio waves are passed through the subject, they are absorbed selectively. The wavelength of the radio waves absorbed by each type of atom varies according to the magnetic field. By measuring the wavelength and the power absorbed as different frequencies are transmitted through the subject, it is possible to determine which atoms are present and their proportions.

Further research is being conducted at the university supported by the Medical Research Council. NMR is not regarded as a rival to X-rays or other forms of image building. It does however have the advantage of possessing no known hazard to humans and, unlike X-rays, it can penetrate bone and could therefore be used to examine hidden tissues such as bone marrow. Its first clinical use is likely to be a new method for the early detection of tumours and the examination of disease states related to blood supply.

Improved froth flotation gives cleaner coal

Norton-Harty Colliery Engineering Ltd is to undertake the development of an improved system of froth flotation for cleaning fine coal. The National Research Development Corporation will be providing a major share of the cost during the first part of this £100 000 project. It is proposed that a full-size unit will be installed in 1979 in a UK coal washery on a test basis and, if the development is successful, the company will manufacture and sell commercial plants for coal treatment in the UK and overseas.

A pilot unit with an output of 1 to 2 tonnes per hour has already been built by the University of Leeds with support from the corporation and tested successfully for coal cleaning at the National Coal Board's Lofthouse colliery. However, before major penetration can be made into the UK and overseas markets, a full-scale plant needs to be evaluated, and the corporation is therefore giving its support to Norton-Harty to develop and build such a plant. The coal board has agreed to co-operate in the appraisal of this full-scale unit.

Froth flotation is widely applied to the enrichment of minerals throughout the world and enables gangue to be removed from the more valuable fractions. A suspension of the fine solids, mixed with a frothing agent, is aerated so that the bubbles carry the hydrophobic mineral into the front, while the gangue or other mineral species sink.

The process is mainly used in the UK for the removal of clays from fine coal fractions in coal washeries. The fine coal rising in the froth must be filtered before blending with the larger coal fractions, but the residual clay content from a conventional flotation cell hinders the speed and efficiency of this costly filtration. Additional flotation stages could further reduce the clay content but, in practice, the cost of installation and operation of these further banks of conventional cells cannot be justified economically for coal.

The development by Norton-Harty and the corporation uses a configuration, devised by Mr C. C. Dell of the University of Leeds, that allows several stages of froth cleaning to be mounted one above another in a compact unit, thereby reducing the clay content to a low level in single process, without the need for additional banks of flotation cells. It is expected that the improved filterability of the fine coal will enable useful capital savings to be achieved in ancillary filtration equipment.

Further applications for this flotation system are expected to arise in the separation of metalliferous minerals such as copper, lead and zinc. These ores are already subjected to several separate stages of flotation which could, in future, be replaced by this single flotation system, with savings in capital and running costs.

Companies interested in applications other than coal processing are invited to contact Dr M. Rendell, Industrial Chemistry Group, NRDC, Kingsgate House, 66-74 Victoria Street, London SW1E 6SL, tel. 01-828 3400.

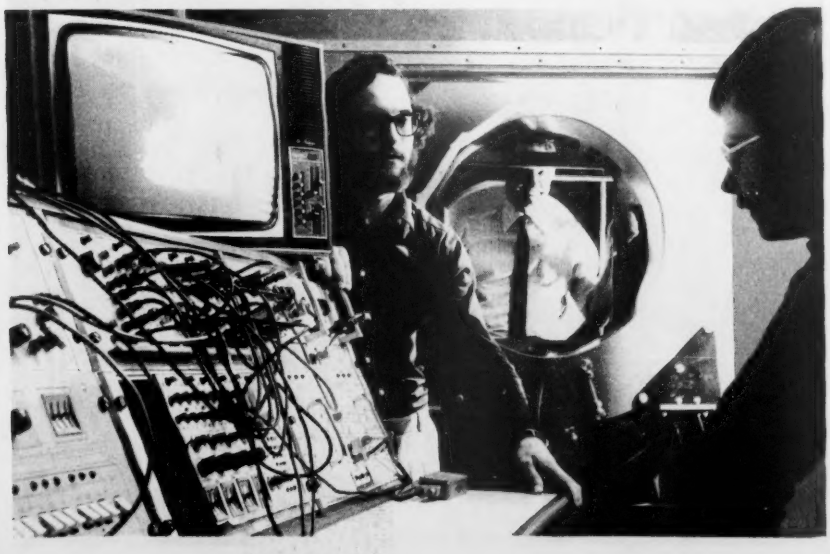
Line-up facilitates major export drive on Prestel

The Post Office, Insac Data Systems Ltd and GEC Computers Ltd have agreed in principle to co-operate in the marketing of systems development and support services for Prestel (previously Viewdata) internationally. The ability to offer a complete package of software, hardware and the Post Office's know-how is essential for a major drive in overseas markets.

Insac's new viewdata systems international division will provide software to meet special systems requirements, and will capitalise on Insac's experience with Prestel in the United States. GEC Computers, whose successful GEC 4000 series computers are at the heart of the Post Office's Prestel services and are also in use by the German and Dutch post offices, see this new market venture as a way of further extending worldwide penetration.

Prestel is the Post Office's information retrieval system aimed at the residential market. Information is transmitted via the telephone system and displayed on a television receiver. The key features of the system are its simplicity of operation, the wide range of planned information and the inexpensive terminal equipment.

The NMR image corresponding to an abdominal section through the 'patient' at the level of the second and third lumbar vertebrae.



New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Microscope projects image on screen

A new stereo 'zoom' microscope, which is claimed to be the world's first, has no conventional eyepiece. It projects the image on to a small screen. Called the TS–1 and designed by Vision Engineering Ltd, it permits the user to have a stereoscopic view of objects magnified up to 100 times on a screen in a recessed anti-reflection viewing hood.

Ideally suited for medical use and electronic research and manufacture, this microscope

Stereo microscope prevents eye strain and fatigue.

prevents the eye strain and fatigue associated with viewing for long periods with a conventional microscope.

The light beam from the basic lens system that does the magnifying is transmitted on to a disc of about 15 centimetres. This is made up of thousands of tiny lenses (lenticules) each having a diameter of about 0.1 mm. Each of these produces a separate image to the eye. By rotating the disc faster than the human eye can follow, at about 3000 rpm, a composite stereo image is built up.

Further information: circle 138

Automatic wash cleans metal components

An industrial washing machine is claimed by its makers, Sturtevant Engineering Products Ltd, to be particularly suitable for automatically cleaning metal components with deep blind holes – for example, valve bodies. It can handle items ranging in size from 8 BA screws in various lengths to any object that can be placed into a tote pan which can pass the machine's 450 mm by 450 mm by 200 mm entry. This means that small gearbox casings can be accommodated.

The machine features a high-pressure rotary head action which, in conjunction with aqueous detergents, safely removes swarf, grease and other dirt. There is no manual handling during the cleaning cycle so that the complete system can be operated by one man. Considerable savings in labour costs compared with conventional static baths, dunking machines and rotary drum machines are thus possible.

Components are delivered into their conventional non-perforated tote pans directly from a machine tool and are automatically indexed into the washing station of the machine. High-pressure jets of hot filtered detergent thoroughly cleanse both pan and contents while dirt, swarf and other foreign matter are allowed to escape. After a predetermined washing cycle, the pan is automatically transferred to the rinse or second wash station while the next tote pan enters the first wash station.

On leaving the rinse or second wash station, the tote pan enters the drying station, where jets of air, heated if required, are played on the components. The pan then passes out of the machine while others move along into the next station in the cycle. For applications where components such as inner-outer tracks for roller bearings are being processed or where exceptional cleanliness is required, a centrifuge is provided to clean the washing detergent.

Washing, rinsing and drying times can be determined for each installation, and separate instantly adjustable time controls are provided for each station. Once optimum cycle times have been set, the machine automatically processes a continuous run of components without further adjustment.

Further information: circle 139

Quiet floodlighting

A range of portable and mobile floodlighting units with the emphasis placed on quieter, reliable running as well as powerful wide-area illumination have been launched by a new company Lite-Rite Ltd. The quieter running has been achieved by completely enclosing the major components – diesel engine and generator, in a lockable weatherproof housing. Principal model is the Towmaster C10, a trailer-mounted, self-contained unit that can be easily erected and handled by one person with a medium-size car or van. Daylight illumination is provided over an area of 2800 m² by high-pressure mercury vapour lamps at a maximum height of 10 m. On a larger version, the C20, the corresponding figures are 5000 m² and 20 m. Both models feature electric starting and a full range of equipment as standard including earth leakage circuit breaker, individual lamp switches and output sockets for the powering of other electrical units.

Further information: circle 140

European community news

Cheaper ECSC loans for UK companies

Details of a scheme that will enable companies to take full advantage of foreign currency loans available from the European Coal and Steel Community (ECSC) were announced by the Department of Industry on 17 August.

The scheme will apply to loans for investment in projects in the development and special development areas which create new employment opportunities for workers affected by redundancies in the coal and steel industries. Loans for such projects are available at favourable fixed rates of interest, and ffect of the new scheme is to provide companies with a guarantee against the risk of exchange losses.

ECSC lends up to 40 per cent of the fixed capital costs of qualifying projects. Loans are subject to a minimum size limit of about £750,000 and are linked to employment creation. Loans are made in foreign currencies and it is expected that the average rate of interest will be 7½ per cent. A charge of 1 per cent will be made for the exchange-risk guarantee. ECSC normally grants an interest reduction on loans which is at present 3 per cent per annum and is available for a period of five years. The combined effect of the new scheme and the interest reduction is a loan free of exchange risk at a net rate of 5½ per cent for five years and 8½ per cent thereafter.

The scheme parallels the Department of Industry's exchange-risk guarantee scheme announced last December for loans from the European Investment Bank (see *Trade and Industry*, 16 December 1977, page 568). It is to be administered in England by the Department of Industry, in Scotland by the Scottish Economic Planning Department, and in Wales by the Welsh Office Industry Department. The new scheme is to run initially for a limited period up to 31 December 1978 but all loans taken up during this period will be covered for their duration.

Loans up to £500,000 will continue to be available through the Industrial and Commercial Finance Corporation under the corporation's existing global loan arrangement with ECSC.

Further information about the scheme can be obtained from Mr A. Rossiter, Department of Industry, Regional Industrial Finance Division, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 3301, or Directorate-General for Credit and Investments, Commission of the European Communities, Batiment Jean Monnet, Plateau du Kirchberg, Luxembourg, Boite Postale 1907, tel. Luxembourg 43011. Information is also available from the Scottish Economic Planning Department and the Welsh Office Industry Department.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For thes week's additional news, turn to the following pages:

Overseas trade news

NTI 1700: imports of textiles from Argentina 441
NTI 1701: imports of iron and steel from Bulgaria and the GDR 442

Country data

Irish Republic 448
United States: speciality steel 449

Statistics

UK trade by air in 1977 462
Film and television material: overseas transactions in 1977 472
Registrations of British, community and foreign films 474

Guide to law on drivers' hours published

Two new sets of regulations concerning drivers' hours came into force on 17 August. The regulations have been made necessary by the need to make UK domestic legislation consistent with EEC regulation 543/69 and to give effect to exemption from the EEC rules agreed with the European commission.

One set of regulations ensures that the 1968 Transport Act duty limits apply to goods vehicle drivers subject to the EEC rules on national journeys, and provides for drivers who switch work between vehicles subject to the EEC rules and those outside their scope and hence subject to domestic legislation. It also preserves the position of the driver on international journeys who is subject to the full EEC regulations alone.

The other set of regulations gives exemption from EEC drivers' hours rules for certain types of traffic. They range from a reduction in daily rest-period requirements for drivers transporting harvest to complete exemption from drivers' hours limits and record-keeping, including the use of tachographs, for minibuses with no more than 15 seats. These regulations apply only to journeys wholly within the UK.

To assist operators and drivers the Department of Transport has published a preliminary version of its booklet, 'A new guide to goods veicle drivers' hours', now available free of charge at all 12 traffic area offices in Great Britain. Available in limited quantities only, the guide has been produced to clarify this complicated area of law as quickly as possible pending the production later this year of a full, permanent version. The booklet is complete except for two annexes which deal in detail with record-keeping and certain relaxations of duty limits (known as 'special needs' exemptions). These matters are at present the subject of consultation with the road transport industry and will be the subject of further regulations to be laid before parliament.

ECGD addresses

The Export Credits Guarantee Department's head office is at Aldermanbury House, Aldermanbury, London EC2P 2EL, tel. 01-606 6699. ECGD has 10 local offices in various parts of the United Kingdom, and these are listed from time to time in *Trade and Industry*.

Seminar on US and EEC prices organised

Discriminatory and excessive prices, dumping both for exporters and EEC inter-state traders, resale price maintenance and the recommendation of prices at unrealistic levels are subjects which will be covered in a two-day conference on 2 to 3 October. The seminar, 'Pricing for the common market and America', is organised by the Institute of Marketing and European Study Conferences Ltd. It will be held at the Kensington Close Hotel, London W8.

Speakers will include representatives from the Office of Fair Trading, a representative from the EEC commission, a speaker on the Prices and Monopolies Commissions, lawyers and economists from the UK, USA and Europe.

Further information is available from Mrs Thorogate at European Study Conferences Ltd, Kirby House, 31 High Street East, Uppingham, Rutland, Leicestershire LE15 9PY, tel. 057 282 2711, telex 342375.

Export control of cobalt waste and scrap

The government has decided to reimpose export licensing control on cobalt waste and scrap (tariff heading ex 81.04) to countries outside the EEC. The arrangement will take effect from 14 September until further notice under the Export of Goods (Control) Order 1978 (Amendment No. 2) Order 1978, made on 17 August.

This measure is designed to help conserve for UK industry a potential source of cobalt, which is currently in high demand.

UK export licensing on cobalt waste and scrap was removed on 3 July as part of a general and long-planned revision and consolidation of the Export of Goods (Control) Order 1970, as amended (Export of Goods (Control) Order 1978 SI 1978/796, as amended). Current uncertainty of the international supply of cobalt has promoted the early re-imposition of licensing, as a precautionary measure.

Copies of the Export of Goods (Control)

Order 1978 (Amendment No. 2) Order) 1978 will be available shortly from HMSO.

Inquiries and applications for licences should be addressed to Export Licensing Branch, Department of Trade, Sanctuary Building, 16-20 Great Smith Street, London SW1P 3DB, tel. 01-215 4247/8.

EIB loan for Shetlands airport extension

Half the estimated cost of extending Sumburgh airport in the Shetland Islands has been granted by the European Investment Bank (EIB) with a loan equivalent to £10.75 million, 16.1 million units of account. Sumburgh is the main transit point for air communications with the North Sea oil and gas rigs. The loan has been provided to the UK Civil Aviation Authority (CAA) for 10 years at an interest rate of 8.9 per cent.

About 80 per cent of passengers passing through Sumburgh are en route to or from the rigs. In 1976, passenger movements totalled about 250 000; in 1977 they reached 400 000 and in the first six months of this year alone they totalled 330 000, stretching the airport's facilities to its limits.

The CAA's extension plans, drawn up after consultation with the oil companies, provide for a new helicopter landing strip, space for parking up to 20 helicopters at any one time, a parking area for 24 medium-size other aircraft, new taxiways to the runway and a larger terminal building. In providing this loan, the EIB was considering the importance of the North Sea oil and gas industry to the community's efforts to reduce its costly dependence upon outside energy supplies. The expansion of the airport will, in addition, provide extra jobs, assist tourism and, in general terms, contribute to the economic development of the Shetlands, one of the most remote parts of the European community.

Competition policy seminar to be held

EEC competition law and policy are the subjects of a two-day conference to be held at the Sheraton Hotel, Brussels on 26 to 27 September. Dr Willy C. Schlieder, director-general of the European commission's competition division, will be the guest speaker.

An international panel of lawyers will highlight and analyse the developments described in the commission's seventh report on competition policy. Four of the sessions will concentrate on new developments under article 86 as they affect business. There will be a repeat of this conference in Rome on 5 to 6 October.

European Study Conferences Ltd, ran over 100 conferences last year. Its new subsidiary, ESC Publishing Ltd, places emphasis on competition law and intellectual property law and will be launching in October the monthly European Intellectual Property Review.

The conference is organised by European Study Conferences Ltd. For further details contact the firm at Kirby House, 31 High Street East, Uppingham, Rutland, Leicestershire LE15 9PY, tel. 057-282 2711, telex 342375.

Publication lists test houses for EEC directives

'UK approval authorities and test houses for EEC directives,' published by Technical Help to Exporters, the export advisory service of the British Standards Institution, lists every directive which existed or was in preparation at December 1977, and details the organisations (22 in all) authorised by the UK government to enforce the directives and the test houses appointed to do the test work.

The directives are divided into 34 subject classifications including: motor vehicles, agricultural machinery, electrical, pressure vessels, textiles, machine tools and machinery, and gas appliances. In addition, the status of each directive is identified as 'total', 'optional' or 'draft'.

Copies are available from the Sales Office, Technical Help to Exporters, British Standards Institution, Maylands Avenue, Hemel Hempstead, Herts, tel. 0442 3111, £6 to THE members and £8 to non-members.

Anti-dumping/anti-subsidies procedures terminated

On 24 January the commission announced the opening of investigations concerning imports of certain galvanised steel sheets and plates originating in Australia; certain sheets and plates of iron or steel originating in Australia and Hungary; iron or steel coils for re-rolling originating in Poland and Hungary; and imports of wire rod originating in Australia, Poland and Hungary. It also announced the opening of an investigation concerning imports of U, I or H angles, shapes and sections, of iron or steel, not further worked than hot-rolled or extruded, originating in Hungary on 9 February 1978. These were in accordance with recommendation 77/329/ECSC.

In the course of these investigations certain arrangements have been made between the community and the Australian, Hungarian and Polish governments that have satisfied the commission that the introduction of protective measures is unnecessary at present and these procedures are accordingly terminated. The formal announcement was made in the *Official Journal of the European Communities* (C184 of 2 August 1977).

Investigation into anti-dumping from east Europe opens

The European commission has opened an investigation into allegations that dumping is being practised or that bounties or subsidies are being granted in respect of imports of poly butadiene-styrene, (CCT subheading ex 40.02 C II; Nimexe code: 40.02-61), originating in the German Democratic Republic, Poland and Romania, and that this is causing injury to a community industry.

Any information relating to the matter may be sent in writing to the Commission of the European Communities, Directorate-General for External Relations, 200 rue de la Loi, B-1049, and should be copied to the Department of Trade's anti-dumping unit at General Division 1, Department of Trade, Kingsgate House, 66-74, Victoria Street, London SW1E 6SJ. Interested parties may, by 16 September, make known their views in writing, in particular by replying to the questionnaire addressed to the parties known to be concerned and by providing supporting evidence.

Furthermore, the commission will hear parties directly concerned who so request when making known their views to the commission, provided they can show that they have an interest sufficient to entitle them to express their views more fully.

The full text of the commission's announcement was published in the *Official Journal of the European Communities*, C 196, 17 August.

New legislation

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

General. Regulation (EEC) 1907/78 correcting regulation (EEC) 1837/78 defining the scope of article 4 (5) of regulation (EEC) 1380/75 laying down detailed rules for the application of monetary compensatory amounts. (*Official Journal* L217, 8 August 1978)

Regulation (EEC) 1947/78 amending regulation (EEC) 1380/75 laying down detailed rules for the application of monetary compensatory amounts. (*Official Journal* L221, 12 August 1978)

Wine. Regulation (EEC) 1861/78 amending regulation (EEC) laying down additional provisions for the common organisation 816/70 of the market in wine. (*Official Journal* L215, 4 August 1978)

Regulation (EEC) 1862/78 amending for the second time Regulation (EEC) 1930/76 on the distillation of the by-products of wine-making. (*Official Journal* L215, 4 August 1978)

Regulation (EEC) 1863/78 determining for the 1978/79 wine-growing year, the prices to be paid under the compulsory distillation of the by-products of wine-making and the maximum amount of the contribution from the guarantee section of the European agricultural guidance and guarantee fund. (*Official Journal* L215, 4 August 1978)

Regulation (EEC) 1936/78 amending articles 4 (4) and 9 of regulation (EEC) 1804/77 as regards the date for the delivery of alcohol obtained from the distillation of the by-products of wine-making by replacing '15 August 1978' with '31 August 1978'. (*Official Journal* L220, 11 August 1978)

Regulation (EEC) 1943/78 amending article 1 (1) of regulation (EEC) 373/78 as regards the event giving rise to payment in respect of distillation operations in the wine sector. (*Official Journal* L221, 12 August 1978)

Regulation (EEC) 1944/78 laying down for the wine-growing year 1978/79 detailed rules governing the distillation of wines produced from table grapes. (*Official Journal* L221, 12 August 1978)

Regulation (EEC) 1945/78 laying down, for the wine-growing year 1978/79 detailed rules for the distillation of the by-products of wine-making. (*Official Journal* L221, 12 August 1978)

Milk and milk products. Regulation (EEC) 1901/78 on the sale of butter at a reduced price during the 1978/79 milk year for direct consumption in the community. (*Official Journal* L216, 5 August 1978)

Processed fruit and vegetables. Regulation (EEC) 1914/78 amending regulations (EEC) 1515/78 and (EEC) 1530/78 on the system of aid in respect of certain products processed from fruit and vegetables. (*Official Journal* L218, 9 August 1978)

Harmonisation of legislation

Measures of length. The *Official Journal* L206, 29 July 1978 contains the text of directive 78/629/EEC adapting to technical progress directive 73/362/EEC on the approximation of the laws of the member states relating to material measures of length.

Further information: Department of Prices and Consumer Protection, Metrology, Quality Assurance and Standards Division, Legal Metrology Branch, 26 Chapter Street, London SW1P 4NS, tel. 01-834 7032 ext. 13.

Overseas trade news

Yugoslavia line of credit: new deadline

There is room for more export business to be financed from an Export Credits Guarantee Department-guaranteed £10 million line of credit made available by Lloyds Bank to Investiciona Banka Titograd, Yugoslavia, ECGD announced on 14 August. Last date for placing orders under this loan, originally opened in 1976, has been extended to 31 October.

The loan is available to help finance capital goods and associated services contracts placed in the UK by Yugoslavian buyers. UK exporters receive 85 per cent of the contract price from the loan, and the remaining 15 per cent is payable from the buyer's own resources. To qualify under the terms of the loan a contract must have a minimum value of £10,000.

Exports for which finance has already been made available from the line of credit include heavy cranes, a copper tubing assembly line and television transmission equipment.

Details are available from Mr D. De Silva of ECGD (tel. 01-606 6699 ext. 7575) or Mr J. L. Hobbs of Lloyds Bank (tel. 01-626 1500 ext. 2497).

Reopening of tariff quota for certain coated printing paper originating in Sweden

HM Customs and Excise has stated that due to the allowance against quota 7173 of claims which subsequently proved to be incorrect, this quota was prematurely exhausted on 11 April 1978. It is, therefore, proposed to reopen this quota immediately for an amount of 447 506 kg.

Retrospective claims relating to goods entered for home use on entries presented on and after 11 April 1978 should be made direct to the Central Tariff Quota Unit, Room 260, Kings Beam House, Mark Lane, London EC3R 7HE.

The claims should state; port of importation, name of ship and date of report, or the name and address of warehouse, entry or free circulation warrant number and date, and entered weight (kg).

Claims should be submitted by 30 September and allocation will be effected as soon as possible after this date.

US medical devices seminar

A seminar, to be held in London in November, to introduce manufacturers to the full range of United States' medical devices legislation, is being jointly sponsored by the British Health-Care Export Council and the Food and Drug Administration (FDA) of the US Department of Health, Education and Welfare.

The seminar programme will be designed to clarify the impact of United States' regulations on imports of medical equipment, to provide information about how the requirements can be met, and to explain how FDA applies them. FDA will be providing several of the speakers so that manufacturers will be able to obtain first-hand advice on any problems.

The seminar will be held in the York Video Theatre at the Heathrow Hotel, London (Heathrow Airport), on 7 and 8 November. Further information is available from Medical Devices Seminar, 43 Charles Street, Mayfair, London W1 (tel. 01-499 1101).

ECGD statutory return

The Export Guarantees Act 1975 as amended was until July 1978 the principal legislation under which the Export Credits Guarantee Department (ECGD) operated. In insuring new UK investment overseas against certain non-commercial risks it operated until July under the Overseas Investment and Export Guarantees Act 1972. The report to end-June 1978, below, lists commitments under the 1975 act as amended, and under the 1972 act.

The above-mentioned legislation has been consolidated into the Export Guarantees and Overseas Investment Act 1978 which came into effect on 30 July 1978. Future returns will be made under the terms of the new act.

Commitments under the Export Guarantees Act 1975 as amended by the International Finance, Trade and Aid Act 1977

New guarantees and liabilities in quarter ended 30 June 1978

The aggregate amount of new guarantees issued involving sterling liabilities under the 1975 act amounted to: £749 million under section 1, £338 million under section 2(1), and the aggregate amount of new liabilities incurred under section 5 of the act was £11 million: a total of £1,098 million.

The aggregate amount of new guarantees involving foreign currency liabilities amounted to: SDR145 million under section 1 and SDR991 million under section 2(1): a total of SDR1136 million.

These represent ECGD's maximum liabilities under new guarantees issued during the quarter. The continuing validity of many guarantees issued prior to the quarter is not reflected here, but is covered in the liabilities totals below.

Amounts recorded against ECGD'S statutory limits as at 30 June 1978

Total outstanding sums recorded against the sterling limit of £25,000 million under section 6 amounted to £20,679 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – £13.258 million
2 Liabilities in respect of guarantees under section 2(1) – £5,525 million
3 Amount of principal monies due under arrangements made under section 2(2) £ nil
4 Amount of principal monies outstanding in respect of loans made under section 3(1) – £1,947 million
5 Sums paid in respect of securities acquired and for the time being held under section 4 – £145 million.
6 Liabilities in respect of arrangements made under section 5 – £70 million

The aggregate of 1 to 6 above will exceed the total liability to the extent that guarantees to banks may have been given under a different section from the related credit insurance guarantees.

Total outstanding sums recorded against the SDR limit of 10 000 million SDR under section 6 amounted, after revaluation, to SDR 2054 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – SDR 394 million
2 Liabilities in respect of guarantees under section 2(1) – SDR1660 million
3 Amount of principal monies due under arrangements made under section 2(2) – nil

Notes

Guarantees are given under section 1 after consultation with the Export Guarantees Advisory Council. Guarantees under section 2(1) are those given in the national interest.

Section 2(2) enables ECGD to provide financial facilities (eg to make payments to match foreign competition on unusual credit terms and to enter into foreign currency loans should the need arise).

Section 3(1) enables ECGD to refinance banks which make sterling finance available on special fixed interest rates for exports sold on credit terms of two years or more.

Section 4 enables ECGD to make finance available to acquire, hold and dispose of securities. This was used to provide aid loans before this function was transferred to the Ministry of Overseas Development.

Section 5 enables ECGD to give cost escalation cover.

Overseas Investment and Export Guarantees Act 1972

Liabilities in quarter ended 30 June 1978

During the quarter the aggregate amount of liabilities incurred was £3 million. This represents ECGD's maximum liabilities under agreements entered into during the quarter.

Amounts recorded against ECGD'S statutory limits as at 30 June 1978

Total outstanding sums recorded against the limit of £250 million under section 2(4) of the 1972 act amounted to £74 million.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1700: imports of textiles from Argentina

The EEC has negotiated with Argentina a restriction on imports into the UK of woven woollen fabric falling within tariff heading 53.11 and originating in Argentina.

Pending enactment of community legislation, the provisions of the arrangement are being operated de facto as set out below. The goods affected and the quota established for goods exported from Argentina during the period 1 August to 31 December 1978 are as follows:

Category no./Tariff heading/Description	Quantity (1.8–31.12.78)
53.11 Woven fabrics of sheep's or lambs' wool or of fine animal hair	60 tonnes

Imports of this fabric from Argentina were already subject to UK surveillance licensing. Current surveillance licences issued under those arrangements were revoked with effect from 18 August.

Licensing arrangements

The Argentinian authorities will administer the quota by issuing to their exporters export certificates endorsed to the effect that the consignments have been debited against the agreed ceiling for exports to the UK. These certificates should be submitted by UK importers, in support of a completed form ILB/A, to

Import Licensing Branch, which will issue import licences up to the quota limit.

Goods in transit
The Argentinian authorities will issue duly endorsed export certificates in respect of these newly restricted goods for consignments exported from Argentina on or after 1 August 1978. Goods in transit to the UK on or before 31 July 1978 will not count against the quota, and will be licensed without the requirement for an export certificate to be produced, provided that satisfactory evidence (ie bill of lading or airwaybill) of the date of shipment of the goods is supplied to Import Licensing Branch in support of a completed form ILB/A.
Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 367.

1701: imports of iron and steel from Bulgaria and the German Democratic Republic

As already announced, following appropriate consultation within the community, imports into the UK of certain iron and steel products originating in Bulgaria and the German Democratic Republic have been deliberalised with effect from 22 August 1978 and the following quotas now apply for the calendar year 1978:

Bulgaria	30 000 tonnes
GDR	43 000 tonnes

The following products originating in Bulgaria or the German Democratic Republic may now therefore only be imported into the UK under a specific individual import licence issued by the Department of Trade:

Tariff heading/Description of goods
ex 73.07 Blooms, billets, slabs and sheet bars (including tinplate bars), of iron or steel, rolled.
73.08 Iron or steel coils for re-rolling.
73.09 Universal plates of iron or steel.
73.10 Bars and rods (including wire rod), or iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished (including precision-made); hollow mining drill steel.
73.11 Angles, shapes and sections, of iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished; sheet piling of iron or steel, whether or not drilled, punched or made from assembled elements.
73.12 Hoop and strip, of iron or steel, hot-rolled or cold-rolled.
73.13 Sheets and plates, of iron or steel, hot-rolled or cold-rolled.
73.14 Iron or steel wire, whether or not coated, but not insulated.
73.15 Alloy steel and high carbon steel in the forms mentioned in headings no's 73.06 to 73.14.
73.18 Tubes and pipes and blanks therefor, or iron (other than of cast iron) or steel, excluding high-pressure hydro-electric conduits.

Licensing arrangements
Applications for specific individual import licences will be considered for any of the above-mentioned goods arriving in the UK on and after 22 August 1978 which can be shown (by production of bill of lading or other satisfactory evidence of shipment) to have been consigned to the UK on or before 21 August 1978. Traders whose products meet the conditions described above are therefore invited to make application on form ILB/A to import Licensing Branch at the address shown above. A further announcement will be made as soon as possible about the allocation of quotas, but traders are advised that account will need to be taken of imports licensed under the conditions described above and also of other imports effected since 1 January 1978. Traders should not therefore authorise further shipments until such time as they are informed that they have been allocated a share of the quotas.

Surveillance licensing arrangements
All surveillance licences issued in respect of any of the products listed above and originating in Bulgaria or the German Democratic Republic were revoked with effect from 22 August 1978, and those products are now subject to the licensing arrangements described above.

Letters of credit
Traders are reminded that current exchange control regulations in respect of goods subject to quantitative restrictions prohibit banks from opening letters of credit or amending those subsisting unless they are satisfied that a valid import licence has been issued for such goods.

Re-export
Applications for iron or steel products intended for re-export will be considered separately against satisfactory evidence.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext 388/389.

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The Post Office is publishing free of charge copies of a series of specially commissioned articles by independent experts on small freight and parcels distribution. Here is a précis of the article, by Peter Gorle of the Metra Group.

'We mean business'

OPENING AND DEVELOPING AN EXPORT MARKET

In the three years since the low point of 1975, the volume of exports from the UK has risen by 25%, demonstrating that there is plenty of opportunity for British exporters.

Help and information

The first step must be to establish where there is a need for the product. This can be achieved through a variety of methods, from detailed market research to a chance meeting at a trade fair with a potential agent.

The British Overseas Trade Board supported by commercial staff of the Diplomatic Service abroad can advise on various aspects of marketing and publicity. Assistance that is particularly useful for a relative newcomer. Other organisations which can help include various Trade and Industry Associations, Chambers of Commerce and Banks.

Information on tariffs, import regulations and product legislation can be obtained from BOTB and HM Customs and Excise. British Standards Institution (Technical help to Exporters section) is an important source.

Banks may be the main source of export cash, unless the agent can be persuaded to finance his own stock. The Export Credits Guarantee Department will cover risks of non-payment and may also provide access to bank loans.

Specific information, advice and assistance on distribution and transport can be obtained from Export House (handling and transportation) and the Post Office (telephone, telex, data transmission and air and surface parcels service).

Focus on one or two markets

Companies with limited resources which stay successful are those which concentrate on one or two markets at a time and build up their operation before moving on.

Too much effort is often spent in prospecting too many markets. This leads to failure to support any of the markets adequately with service and delivery – a frequent criticism of British exporters.

When smaller companies tackle too many markets at once, it results in two other easily recognised faults – absence of key senior people for long periods on long sales trips and a complacency about exports which sales fail to reflect.

Market involvement

Domestic channels may be preferred for a preliminary low effort export attempt, but the use of individuals or companies in the export market provides for better contacts with potential customers.

To sell locally in an export market normally requires the use of agents acting on a commission basis, distributors, or agents acting on a franchise basis.

The advisory organisations mentioned previously can be very useful in locating and verifying the effectiveness, reliability or credit worthiness of potential agents.

Shipping methods

Unless domestically available export channels are being used, the mechanics of overseas distribution can be both unfamiliar and daunting, affecting export performance.

There are some general rules but each case may require different treatment, as shown on the chart below.

Method	Time	Av. cost index	Remarks
Air freight	day(s)	4	– less packaging, quicker turnover of stock
Post	days	2	– delivery to many addresses – special advantage is low minimum weight charging level – less paperwork
Rail	days/ week	1	– weight less critical than road providing handling facilities are available
Road	days/ week	1	– generally short trips 500 to 1,000 km; weight less critical than air
Ship	week(s)	½	– low value per unit weight can take advantage

There are factors which complicate matters. Certain air route rates are much lower than others due to competition from containerised shipping. Individual parcels or small consignments may be cheaper by post because air freight can involve a relatively high minimum rate. For larger consignments the opposite may be true. Discounts can usually be negotiated with most carriers for regular orders while different commodities attract different rates.

Small parcel exporting

A small survey in April 1978 among a random cross-section of exporters yielded some interesting information on exporting/distribution methods in relation to small parcels. It covered the relative usage of sea freight, air freight, road containers and parcel post methods for small parcel exports.

Postal parcels are primarily sent when speed and low cost are combined factors. One advantage is that less paperwork is needed, although proof of posting documentation can be provided. Identifying the reasons for a delay, or loss due to pilfering, is not generally a problem in either postal or air services, however.

Help and information, concentration on a few markets, involvement by the company in these markets and minimisation of shipping costs; these are the main pointers to follow all dealt with at greater length in the main article.

To Jackie Willbourne, Room 434,
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Please send me.....copies of the full article: *Opening and developing an export market* by Peter Gorle of the Metra Group.

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Trade prospects with China look good -Dell

Prospects for an increase in Anglo-Chinese trade look very promising following a top-level trade mission to China from 2 to 14 August, led by Secretary of State for Trade Edmund Dell, at the invitation of Li Ch'iang, Minister for Foreign Trade.

The signs were already evident before the party assembled in Hong Kong. Five Chinese ministers with economic and industrial responsibilities had been to the UK in the past nine months. Mr Dell was the third British cabinet minister to visit China since the spring.

The Chinese have recently signed a trade agreement with the Japanese, their biggest business partner. They are developing trade links with the United States without waiting for diplomatic 'normalisation'. The importance they attach to relations with western Europe has been symbolised by the EEC-China trade agreement.

During four days of official talks in Peking the team had many hours of formal meetings with Li Hsien-Nien, a vice-premier for more than 20 years and one of the main driving forces behind China's new economic strategy, the host Li Ch'iang, Minister of Foreign Trade, Huang Hua, the Minister for Foreign Affairs, and eight other economic and industrial ministers.

In addition, the businessmen and officials penetrated beyond top policy decision-makers to begin to discuss new ideas in more detail – as well as continuing negotiations already under way – with the leaders and technical experts of state trading organisations.

We look here at Mr Dell's evaluation of the mission and at the reaction of some of the businessmen who were on the top-level team.

China wants to do business with Britain. This is the basic message brought back from the Chinese leaders by Secretary of State for Trade Edmund Dell and the 13 leading British businessmen who accompanied him to China.

Evaluating the mission the day before he returned Mr Dell urged British industry to 'make a speedy and competitive response to the positive reception we received in China', particularly in view of the opportunities that would be provided by its ambitious development programme.

He pointed out that China was a highly competitive market and that the Chinese would judge the competition on its merits.

The backdrop to the visit, said Mr Dell, was a fundamental shift in Chinese policy. 'The present Chinese leadership knows that it needs a significant element of foreign co-operation if it is to raise sufficiently rapidly the living standards of the Chinese people – one quarter of the world's population.'

He indicated the opportunities presented by the 10-year economic plan, outlined by Chairman Hua Kuo-Feng at the fifth national people's congress in March this year. It contained no less than 120 important projects said Mr Dell. They included 10 large-scale iron and steel complexes, eight coal mines, 10 oil and gas fields, 30 power stations, six trunk railways and five harbours. One steelworks package ordered from Japan would cost $US3.4 billion.

'That indicates the potential business British industry is now chasing in China. It also underlines the importance I attached to the presence in my party of an impressive cross-section of men who could speak for many sectors of British industry. Their impact cannot be over-estimated. At each ministerial meeting they took turns to make short presentations explaining what their sectors could offer China. In this way, we covered a great deal of ground.

'Judging from the response,' he continued, 'we left the Chinese leaders in no doubt about UK capacity to contribute to the modernisation of China's obsolescent industries, our ability to design, build and equip new industries, our skills in consultancy and our experience in devising flexible financial arrangements which will help China to finance a programme that will stretch its own resources to the limit.

'One key question for my party was how far the Chinese have changed their policy on finance and credit arrangements. Traditionally they have avoided taking credit, although they have occasionally accepted "deferred payments".

'In recent months, however, the government has changed this policy. Although they are still to some extent feeling their way, and decisions will be made on a case-by-case basis, they will certainly accept credit. The new pragmatism is summed up in one of those pithy sayings attributed to Teng Hsiao-P'ing, senior Vice-Premier: "I don't care if the cat is white or black so long as it catches the mouse." '

Mr Dell pointed out that Li Ch'iang had told Mr Dell that they would respond to the conditions of international trade that had been developed over hundreds of years and that they would adopt many flexible methods of financing, except government-to-government loans and joint investment in China.

On the key question of compensation trading and counter-purchase deals the theme e from the Chinese side had again been flexibility. Mr Dell said that he had made it clear that contracts of this kind were for businessmen not the British government.

Another question of special interest to

Pictured with Edward Dell, Secretary of State for Trade (fourth from left), are Li Ch'iang, Minister for Foreign Trade (third from left); Li Hsien-Nien, Vice-Premier, responsible for economic affairs (fifth from left); Mr P. Cradock, British ambassador (sixth from left). Also pictured are UK and Chinese officials and members of the UK trade delegation.

British industry's most spectacular success to date in selling to China has been in aviation.

businessmen making their first visit to China was how to penetrate beyond the decision-makers to the technical experts in the trading organisations so that they could begin to find out precisely what the Chinese wanted and to explain what they could offer.

Mr Dell explained that the 'old China hands' in the party and the Chinese themselves had cautioned patience in negotiations.

Turning to the areas in which the Chinese had shown an interest, Mr Dell said that in addition to those industrial sectors in which the UK enjoyed a close relationship – especially mining and aerospace – the Chinese were now interested in the UK's capacity to help their development plans in iron and steel, power generation, offshore oil, chemicals and petrochemicals, railways and other industrial infrastructure sectors.

Mr Dell stressed that Chinese economic policy could not be separated from China's world view and diplomatic and political strategy. Ministers had repeatedly emphasised that, to pursue its goal of economic modernisation, China needed peace.

The motive for the Chinese decision to work with the industrialised democracies was hard-headed, he continued. The Chinese recognised that this was the best hope for providing China with the social and economic dynamism and the strategic security it needed for survival, let alone prosperity.

'Strategically, therefore, the new Chinese policy requires a positive response from the west. As far as I am concerned, this means an aggressive campaign by British industry. My visit has helped to open some doors. There is now a need for a response from industry which will need to match that of the businessmen who accompanied me.'

Mr Dell concluded his evaluation with some of the main points made at the final debriefing session before the team left Peking.

☐ The Chinese market for major projects must inevitably be predominantly for the big companies in a few key sectors. Only they can build a solid base on which the UK can expand trade with China. And if they associate other British companies with their efforts, they will open the market for organisations which do not have the resources to go it alone.

☐ Companies must be prepared to invest the time and money of senior managers, scientists and technologists – backed by all the most professional audio-visual aids available – to sell themselves and their specific projects. This could mean the expense of continuous representation in Peking, if the Chinese permit this.

☐ They must be prepared to offer packages in which management and technological training is an essential part, because China needs more skilled men to run advanced technological projects at maximum efficiency.

☐ They must try to help the Chinese develop its exports which include both manufactured products and valuable raw materials. Compensation trading or counter-purchase deals are not the only way of doing business in Peking. Provided they can pay for their imports – Mao's theme of self-reliance is still fundamental to their thinking – they are prepared to be flexible about financing and credit arrangements.

'Waffle won't do'

Gracious manners and a lack of 'waffle' – that's how Sir John Buckley, chairman of Davy International, suggests approaching the Chinese. Marianne Semadeni spoke to him on his return from the People's Republic of China, and asked him for some practical hints on trading with the Chinese.

Present limited lack of manufacturing capacity makes the People's Republic of China a very attractive market for UK engineering contractors and their plant suppliers, for the net value of any contract to its trading partner will be very close to the total value. Sir John Buckley, chairman of Davy International and member of the trade mission, points out that 80 to 85 per cent of a £10 million contract from China would be true exports from the UK, worth £8.5 million. A similar deal with, for example, Brazil, and the value of exports would be down to 50 per cent of the contract.

The reason is that most major markets now are in developing countries with both a national development plan and a great deal of manufacturing capacity. Contracts, therefore, need politically to have a large local industry content, which is usually not very efficient, Sir John says, and is therefore fairly expensive. A country like China at this early stage in its manufacturing development is therefore a particularly attractive market for an exporting country like the UK. Sir John sees this continuing into the eighties and to the end of the century, especially if this country can get off to a good start and establish a first-class reputation.

To begin with, trading with the People's Republic of China is going to be a job for the big companies. All major developments needed for industrial expansion – the steel works, chemical works, major generating units, on and offshore petrochemical works – are planned for the next five to 10 years. If the UK can become an established supplier in these fields then the next tier of trade can begin.

'A country like China at this early stage in its manufacturing development is a particularly attractive market for an exporting country like the UK.'

But what are the practicalities of trading with the Chinese, how difficult is it, and how is business carried out?

Sir John says his company has found trading with China no more difficult than anywhere else with a centrally planned economy. 'Up to now the Chinese have not done much international trading and are having to build up a machine for both technical and commercial appraisal. We found it no more different than dealing with most other communist countries.'

Ministries deal with specific sectors – for example, petrochemicals – and handle contracts in these areas, seeking suppliers and putting into effect politically decided development plans. Actual negotiations are carried out by the commercial organisations which deal with each of the six key sectors of the economy.

If a company is thinking of trying to enter

the Chinese market, the best way is to go on either a trade-associated or government-sponsored mission. Later on, if the volume of business justifies it, the company can apply to the Chinese sponsoring department to bring in its own mission. But Sir John feels that initially the most senior executives of the company should go out. 'The market is not a cheap one either to break into or to service, so the company must go in whole-heartedly from the chairman down. Then the sales and technical people can go there and follow up.'

Sir John stresses though that these missions should not go out too frequently, but suggests they should be led by the senior minister from the UK Departments of Trade, and Industry, once a year. 'They should not be too big, there should be a lot of preparation and it should be professionally done. "Waffle" won't do. You have to get in there and do some direct talking.'

The key to communicating with the Chinese lies in the phrase, 'friendship first, trade second', which has been often quoted in connection with the recent mission.

'The Chinese have gracious manners and like to feel they are dealing with friends. They are a highly sophisticated people and the fact that they are backward industrially does not mean they are culturally backward, quite the reverse. This has to be remembered. And they are desperately anxious to catch up industrially.'

This is illustrated in the about-turn the Chinese have made on credit. In Mao's time, the Chinese were vehemently against any form of credit but in the last 18 months Chinese leaders have realised that if they want industrial expansion at the planned rate, they can not possibly generate enough overseas currencies to pay for it. They have now accepted that some form of borrowing is essential and this was an aspect of trade discussed extensively on the recent mission.

The next step forward for Davy International is to respond to one or two inquiries for petrochemical plants received on the mission, in addition to the two plants just signed for. With regard to steel, next month the company, with the British Steel Corporation, will be taking a joint mission out to China, sponsored by the metallurgy ministry, to discuss their plan to build 10 major integrated steel plants. 'But the main thing for the UK is to keep visiting, to talk to them, and to listen to what they need. For political and strategic reasons the Chinese are looking to western Europe, and Great Britain in particular, for suppliers, and the opportunities for UK industry are there.'

Timing it right

The businessmen were unanimously agreed that the timing of the visit was absolutely right. Right timing will be an essential element in opening up the Chinese market on a substantial scale to British goods and services. Here we publish some impressions about the Chinese market from some of the delegates on the mission. Those who had visited China before agreed that the change in the atmosphere in the last year – even in the last few months – was very significant.

Sir Derek Ezra, chairman, NCB, who also represented the Nationalised Industries Overseas Group: There is a considerable scope for nationalised industries and the private sector organisations that supply them. They have taken aboard the idea that we have considerable experience in modernising our older industries, as well as developing green field sites. But there is no doubt about it we shall face intense competition from other industrialised countries.

David Chapman, director, P.E. Consulting Group: I was representing the British Consultants Bureau, which includes representatives from both the private sector and the nationalised industries. I found the Chinese very interested in the concept of consultancy which can provide them with technical, management, design and manpower training services. And I think that they were impressed by Britain's worldwide reputation in this field. But consultancy is a new idea to the Chinese and we must have further discussions with them to decide how best we can help their vast development programme.

Lord Limerick, director, Kleinwort Benson: I spoke to the Chinese on behalf of the banks, including the merchant banks, and I made the point to them – which I think they have already seized – that London is the most important international banking centre in the world. Banks from all parts of the world are represented here and there are, in fact, more US banks in London than in New York. The banking sector, including the merchant banks, has a worldwide reputation for traditional banking methods and for inventiveness, ability to innovate and flexibility. I stress that China's international standing is excellent and no British offer should fail for lack of financial support. We had a number of meetings with the Bank of China, with Ken Cotterill, of ECGD, and we examined and discussed a number of flexible proposals which should help to increase trade flows between the UK and China.

Sir John Keswick, currently vice-president Sino-British Trade Council and a director, Jardine Matheson: As chairman of the British Trade Council for nearly 20 years, I found the whole mission to be a marvellous experience. The slogan we used at the 1973 British industrial exhibition was 'friendship first, trade second', and I think that symbolised the flavour of this visit. I made two basic points to Li Ch'iang, Minister for Foreign Trade: that I am confident that UK industry is now competitive; and that we can provide the Chinese with the technical assistance they need. I believe we can now aim to treble our trade with China in the next couple of years.

Gordon Planner, deputy chairman, the Sterling Group: I visit China frequently and was last in Peking in June with the '48 group', an informal group of businessmen who have been trading with China for many years. I certainly noticed the change in the atmosphere. The discussions we had on compensation trading would not have been possible two years ago. I took them concrete proposals about compensation trading and counter-purchase deals involving both manufactured goods and raw materials. But until the current development plan begins to produce results, there will be a shortage of products for China to sell. So the secret for companies involved in compensation trading will continue to be to get there first.

Sir James Woodeson, chairman, Northern Engineering Industries: My contribution on the visit to China was to emphasise the skills, both from a manufacturing and operating point of view, of the UK in power-generation, transmission and distribution, as the development of electrical power is one of the main priorities of the Chinese government. The UK's national power-generation and grid network is the most advanced in the world and the heavy electrical manufacturing industries, coupled with the operating experience of the British electrical supply industry, can offer the Chinese this vast experience and advanced techniques.

Frank Edwards, deputy chairman, Humphreys and Glasgow: Like Sir John Buckley, I spoke to the Chinese on behalf of the process plant industry, for which London is the world centre. When I visited China last year, one of the ministers we saw told us not to return to Peking empty-handed and not to engage in empty talk. We took him at his word and we put forward positive ideas and concrete proposals during the visit.

Robert Aldred, chairman, Taylor Woodrow International: I spoke on behalf of the UK civil engineering and construction industry in general, which has played a leading role in development, originally in the UK, and latterly has provided a major contribution to the development of many Commonwealth and other countries. Our contribution to China's development could include technical expertise and management in mining and agro-industrial projects, as well as the construction of harbours, ports, airports, railways and structural aspects of many other industrial projects.

Sir Arthur Knight, chairman, Courtaulds: We built an acrylic fibre plant for the Chinese no less than 12 years ago. And we have also been supplying fibre to China for many years, as well as marine paint. I brought new proposals with me which take account of the progress we have made technologically and I am hoping to follow this up with more detailed talks to assess possibilities with the Chinese.

Peter Brackley, general manager, BP Processing: I naturally spoke about the energy business and our success in the North Sea where we have mastered some of the worst conditions in the world. They were clearly impressed with the way we managed to develop our technology so that we took only four years from discovery to production and they took the point that, with improvements in technology, the speed of development is now increasing. China has made great strides forward with its oil in the past few years and there is obviously room for co-operation on exploration, production, pipelines, terminals and refineries.

Overseas trade exhibitions

Finance and services on display in Argentina

From J. S. Chick, British embassy, Buenos Aires

There was a strong British team at the Anglo-Argentine seminar on finance and services in Buenos Aires from 12 to 14 July. Financial and banking institutions of the City of London made up the greater part of the British team, but insurance firms, commodity traders and consulting engineers were also represented.

On the Argentine side, the Ministry of the Economy invited over 70 participants, drawn from both public and private sector banking and financial institutions, the stock exchange, the national grain authority, and leading industrial and consulting firms.

The Committee on Invisible Exports, the Anglo-Argentine businessmen's committee on trade and investment, and the British embassy in Buenos Aires, joined forces with the Argentine Ministry of the Economy and the Argentine Banco de la Nación to stage the seminar.

The principal speaker at the formal opening meeting was the Minister of the Economy, Dr José Alfredo Martínez de Hoz, tracing the main lines of development of the Argentine economy in the two years since the present government came to power. Sir Jasper Hollom spoke of the financial and other services that could be provided by the City of London.

The meeting then divided into working groups, each with an Argentine chairman and a British speaker. The subjects covered within the groups were gold, foreign exchange,and eurodollars; commodities; the development of a money market; project finance; the development of a capital market; and other services. In each case, after the preliminary talk by the member of the London mission, there was a round-table discussion between participants.

The Argentine and British participants remarked upon the excellent quality of presentations made and the high level of subsequent discussion. It was generally thought that the seminar, following the visits to Buenos Aires earlier in the year of the London and Birmingham chambers of commerce, served a useful purpose in demonstrating to a select group of Argentine businessmen and bankers the full range of financial and other resources available in Britain to overseas clients, particularly those centred on the City of London.

Heating module heads for Poland

Seen nearing completion in the industrial division of Redring Electric at Peterborough is the first of 18 heating modules, each weighing more than one ton, which will provide heat to the core curing and drying ovens of British plant being supplied to Poland. The modules are on order from Stone-Wallwork International and will be incorporated in six ovens which are part of core making machinery being supplied to Poland for the manufacture of Massey Ferguson tractors and engines.

European-American

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Overseas trade country data

Argentina

Import suspension. Resolution 588/78, 18 May extends the suspension on imports of colour television receivers (CCCN 85.15.01.02) from 6 June for a further 180 days. Exceptions to this suspension of importation are those colour television receivers intended for teaching or experimental purposes, with prior confirmation by the Secretary of State for Communications. A copy of the resolution is available in Spanish on request.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Australia

Luggage. A notice in *Trade and Industry* reported that a temporary additional duty had been imposed on imported luggage wef 12 January pending a review of long-term assistance needs of the industry by the Industries Assistance Commission (IAC).

The IAC is now in a position to proceed with this inquiry and wishes to obtain certain basic information from firms and organisations intending to take part in the inquiry. To facilitate this a public inquiry has been arranged for Tuesday 10 October commencing at 10.00 am. The venue will be The Public Inquiry Room, Industries Assistance Commission, 16th Floor 59 Goulburn Street, Sydney, New South Wales.

UK firms and trade associations intending to submit evidence at the public hearing should advise the Secretary, Industries Assistance Commission, 606 St Kilda Road, Melbourne, Victoria 3004 no later than 11 September 1978. Evidence may be submitted through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18–20 Lower Regent Street, London SW1Y 4PW, tel. 01-930 2524 which will represent UK interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Import licensing: high-priced footwear. The Australian government has announced that footwear exceeding a value for duty of $A 23.50 per pair are exempt from import licensing; and as from 1 January 1979 exemption will apply to footwear having a value for duty exceeding $A 24 per pair.

This 'threshold' price level is adjusted each six months in line with movements in the footwear component of the Australian consumer price index.

Insulators. Following a report by the Temporary Assistance Authority the Australian government has decided upon the following tariff alterations:

7 Omit sub-items 85.25.1 and 85.25.9, substitute the following sub-items:

85.25.1	Insulators, as follows:	Free	Free
	(a) being assemblies of the stacked type incorporating two or more separate insulators, both or all of which are usable at nominal system voltages exceeding 88 000 volts;		
	(b) of the suspension disc type, having an electro-mechanical failing load exceeding 147 kilonewtons;		
	(c) of the pin type, not being goods falling within sub-item 85.25.3, suitable for use at nominal system voltages exceeding 1 000 volts;		
	(d) of types not specified in paragraphs (a) to (c) (inclusive), suitable for use at nominal system voltages exceeding 88 000 volts		
85.25.2	As prescribed by by-law	Free	Free
85.25.3	Pin type insulators of porcelain, suitable for use at nominal system voltages exceeding 1 000 but not exceeding 88 000 volts	Free, and a temporary duty of 75%	Free, and a temporary duty of 75%
85.25.9	Other	37.5%, and a temporary duty of 37.5%	30%, and a temporary duty of 45%

The operative dated is to read 9 August 1978.

Heavier commercial vehicles and components. Following a report by the Industries Assistance Commission, the Australian government has announced the following revised assistance arrangements:

Duty of 22.5 per cent to apply to assembled general purpose commercial vehicles and buses over 2.72 tonnes GVM and a 25 per cent duty on prime movers for articulated dump trucks: These new arrangements will apply from 17 August 1978 and will terminate on 31 December 1984.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Ghana

Import licences. The Ghanaian government has announced that the use of special unnumbered licences is now forbidden.

Inquiries: OTAR 01-248 5757 ext. 472.

Irish Republic

Textiles origin documentation. Irish Republic revenue commissioners have published the following notice no. 1490 dated July 1978:

Notice no. 1490
Notice by the Revenue Commissioners
Origin documentation for
I. Textiles originating in the EEC
II. Textile piece goods in free circulation in the EEC

1 Importers, agents and other persons concerned are advised that for textiles and textile articles originating in the Community a declaration on the invoice certified by the manufacturer of the goods may be accepted by the Customs Officer at the point of importation in lieu of a European Community certificate of origin. The declaration should be in the following form:

I, the undersigned, manufacturer of the goods described in this invoice, certify that the goods originate in

.....
(name of country where declaration is being made)

In accordance with the provisions in force in the European Economic Community.

Done at .....on the .....
(place) (date)

Signed .....*

*Insert Director, Secretary etc. as appropriate.

Name and address of manufacturer .....

.....

.....

2 The concession applies to all textiles and textile articles which are subject to prohibition or restriction under the Control of Imports Acts, 1934 to 1964 (Quota Orders nos. 51 and 52, as amended) or to EEC quantitative restrictions.

3 As a further concession, in the case of textile yarns and textile piece goods viz.

a Yarns of tariff chapters 51 to 57 (inclusive);

b woven piece goods (not made up) of tariff chapters 50 to 59 (inclusive); and

c knitted or crocheted piece goods (not made up) of tariff headings 60.01 and 60.06

which are in free circulation in the EEC (irrespective of where they originate) a declaration of origin on the invoice certified by the supplier/exporters of the goods may also be accepted in lieu of a European community certificate of origin.

4 Further evidence of origin (including a community certificate of origin) must be produced in any case in which the revenue commissioners are not satisfied as to the origin of the textiles or textile articles.

5 The concessions referred to in this notice do not affect the requirement of certificates of origin by the Department of Industry, Commerce and Energy for national surveillance or other purposes.

Dublin Castle. C. & E. 740/102/78.
July 1978. NOTICE NO. 1490.

Exporters are advised to check with their Irish customers about the exact implications of notice no. 1490.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Japan

Fire regulations for carpeting for use in public places. A note by the British Carpet Manufacturers Association sets out the position regarding fire regulations for carpeting for use in public areas. Copies of this note and unofficial translation of the testing procedures are available.

Inquiries: OTAR 01-248 5757 ext. 420/475.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Jordan

Road transport regulations. The Jordanian Ministry of Public Works has introduced new road transport regulations governing loaded weights and measurements for vehicles.

1 Maximum measurements for vehicles:
a Overall width 2.5 m.
b Overall height 4 m.
c Overall length for:
Truck with two axles 10 m.
Truck with more than two axles 12 m.
Bus with two axles or more 12 m.
Vehicle with two axles and semi-trailer 15.5 m.
Vehicle with more than two axles and semi-trailer 16.2 m.
Vehicle with more than two axles and trailer 18 m.
Vehicle with more than two axles and two trailers 22 m.
2 The maximum load on the main carrying axles should not exceed the details specified by the manufacturing company provided the axle load does not exceed 12 tons for the main carrying axle and 16 tons for double axles. The maximum load plus vehicle weight should not exceed 35 tons.

Inquiries: CRE 01-215 3508.

Lebanon

Insecticides, pesticides and rodenticides. The Lebanese government published in the *Official Gazette*, 18, 4 May, details of law 11/78 relating to legislation for the importation, selling, filling, packing, preparation, manufacture and spraying of insecticides and rodenticides.

An unofficial translation of articles of the law is available on request.

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Mexico

Tariff amendments. Acuerdos of the Secretaria de Comercio published in the *Diario Oficial* of 3 August 1978 amended the official prices of some goods in tariff headings 22.05, 69.04, 69.07, 69.08, and 90.28.

Inquiries quoting product and tariff headings: OTAR 01-248 5757 ext. 476/474.

New Zealand

Metal-working machine tools. The New Zealand Ministry of Trade and Industry has announced that licences will be granted for the import of certain types of metal-working machine tools under import licensing code 84-371 (tariff heading 84.45), for stock purposes. Previously, applications had only been considered on an individual machine basis with particular reference to the need of the end user.

Applications from regular importers in New Zealand are therefore invited for licences to import:

1 Lathes
2 Planing, shaping and slotting machines
3 Boring, tapping, reaming, milling, broaching, gear cutting, engraving, polishing, lapping and honing machines.
Note: drilling, vertical-milling, sawing and grinding machines are specifically excluded.

Interested UK firms may wish to alert their agents or importers in New Zealand.

Inquiries: OTAR 01-248 5757 ext. 401/468.

Saudi Arabia

Soft drinks and mineral water. The Saudi Arabian Standards Organisation has issued a standard for soft drinks and mineral waters. A copy of the Arabic version of the standard is available on request.

Inquiries: OTAR 01-248 5757 ext 7062/475.

South Africa

Tariff application. Customs tariff application list, 26/78, published in the South African *Government Gazette*, 18 August, contains an application to the Board of Trade and Industries for increase in duty on:

methyl acrylate monomer, ethyl acrylate monomer, n-butyl acrylate monomer, 2-ethylexyl acrylate monomer and methyl methacrylate monomer, classifiable under tariff subheading 29.14.90

British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

Inquiries: CRE 01-215 5274.

General rebates. The following amendments were published in the South African *Government Gazette*, 28 July.

R.1542. Item 410.04, CCCN.27.10. It is made clear that power, illuminating or heating kerosene may not be entered under rebate of customs duty for aviation purposes. Extent of rebate – full duty less 1365C per 1000 litres.
R.1543. Item 460.16, CCCN. 84.45. Provision, with retrospective effect to 3 January 1975 is made for a rebate of duty on parts forming part of certain unfinished unassembled centre lathes subject to the conditions specified in the rebate provision (1) headstock and tailstock assemblies and beds – full duty (2) other – full duty less 20 per cent.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Spain

Duty free import of equipment and aids for the handicapped. The Spanish *State Gazette*, 1 August, published royal decree 1793/1978 establishing that, from the date of publication, equipment and aids, also vehicles, specially built for use by handicapped or physically disabled persons, not manufactured in Spain, will be free of import duties.

Imports must be previously authorised by the Ministry of Commerce and consigned directly to the handicapped or physically disabled person.

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

Ethyl alcohol: suspension of import duties. The Spanish *State Gazette*, 1 August, published royal decree 1795/1978 of the Ministry of Commerce, suspending for three months the import duties on ethyl alcohol. This suspension covers the period from 11 July to 10 October 1978.

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

St Vincent

Import licensing. The St Vincent authorities have announced that the following goods now require an import licence:

Tariff no.	Description of goods
11.01	Cereal flour of wheat or meslin

Inquiries: OTAR 01-248 5757 ext. 7321/456/457.

United States

Automotive and motorcycle repair manuals from the UK. The United States treasury department announced an anti-dumping investigation in the *Federal Register* of 8 August. Only one UK supplier has been identified in the petition, but any other UK exporters of this merchandise who have not so far been implicated may request inclusion in the investigation if they so desire.

This is suggested because an individual exporter cannot qualify for exclusion from any findings (including withholding of appraisement) unless all sales from that exporter are examined per section 15338 of the US customs regulations and found to be made at not less than fair value. Furthermore, potential future exporters of this merchandise are advised that if a finding of dumping occurs, future shipments from them to the US would be subject to the finding. The fact that they are not presently exporting would not exclude them from a finding.

Inquiries: CRE 01-215 5397.

Speciality steel. Imports in pounds weight from the EEC of speciality steel under quota as at 28 July 1978:

Plates of stainless steel (item 923.21) 413, 736.

Inquiries: CRE 01-215 5397.

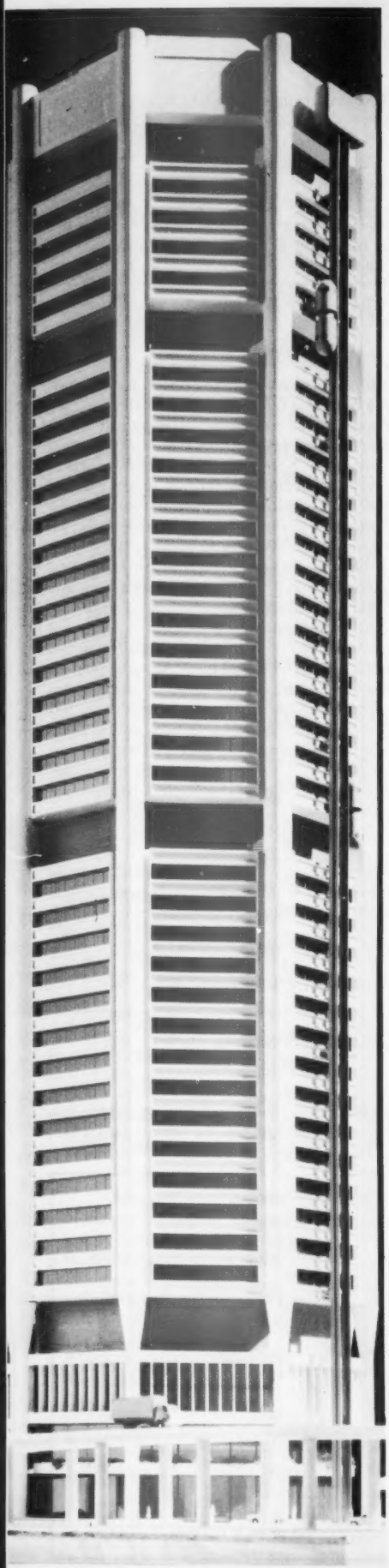
Yugoslavia

Agencies. A new law on agency agreements has been published in the *Official Gazette*.

Inquiries: OTAR 01-248 5757 ext. 468.

CRE Commercial Relations and Exports Divisions
Department of Trade
1 Victoria Street, London SW1H 0ET
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section
Export Data Branch
Export Services and Promotions Division
Department of Trade
Export House, 50 Ludgate Hill, London EC4M 7HU
Tel. 01-248 5757 (extension at end of each notice)



British design goes further afield

Last year British designers, consulting engineers, architects and surveyors again increased their contribution to Britain's overseas earnings, both by expansion in countries where they are already well-established and by extending in other areas. In their annual review of overseas projects the three professional associations describe recent achievements.

Consulting engineers

At the start of this year UK members of the Association of Consulting Engineers were responsible for overseas projects worth £31 000 million in 152 countries – record figures. Examples of the many projects going ahead are described in this article by ACE[1].

As civilisation advances so does the demand for water. And British consulting engineers are helping to satisfy that demand. Three large water treatment works designed by Binnie and Partners are under construction – two in India and one in Turkey.

For the first time a fully treated supply of potable water will be provided for the city of Bombay. The stage 1 works at Panjrapur, near an intake on the Bhatsai river, will chemically coagulate and settle river water which becomes very turbid during the monsoon period. Up to 455 mld (100 million gallons per day) will then be pumped to the new treatment works to be constructed at Bhandup. The stage 2 development of the Panjrapur works will provide complete sedimentation, filtration and sterilisation treatment enabling water to be pumped directly to Bombay without further treatment.

At Bhandup, on the outskirts of Bombay, a mixture of water from three separate sources will be fully treated. The works with a base output of 1910 mld (415 million gallons per day) and a maximum capacity of 2100 mld (455 million gallons per day) is one of the largest in the world to be built in a single construction stage. After treatment, water is pumped from Bhandup to a master balancing reservoir for distribution under gravity. Moraji Desai, India's Prime Minister, visited the complex and laid the foundation stone for the filtration plant in January this year.

Completion of the two works is scheduled for 1980.

In Turkey, the Ivedik treatment works for the city of Ankara is designed to be developed in four equal stages to provide an ultimate supply of 2256 mld (500 million gallons per day). The works, which will ultimately treat water from two reservoir sources, includes provision for energy dissipation at inlet, and utilises large flat-bottomed upward flow tanks for the sedimentation stage of treatment. Design and construction of the works has been complicated by the presence of expansive clays below the foundations. The first 564 mld (125 million gallons per day) stage should be completed during 1981-2.

Another ACE member, Ward Ashcroft and Parkman (Nigeria), has recently completed the Kangimi earth embankment dam in Nigeria to increase water supplies substantially to the town of Kaduna by supplementing the Kaduna river flow. The impounded water will be used to augment the flow in the Kaduna river by releasing water into its tributary, the Kangimi, during periods of drought. By maintaining a minimum flow of 50 mgd in the Kaduna river, the existing abstraction and treatment works will continue to provide the town water supply during periods of severe drought. The minimum flow will be adequate provision for the foreseeable future. In addition, sufficient water will be stored to irrigate a 4000 acre strip of land on the north bank of the Kaduna river.

The embankment itself consists of a core of compacted cohesive material, of low permeability, with shoulder constructed of selected granular soils. Both these types of soil were available within easy reach of the dam site. The overall cost of the project amounted to some £5 million.

Trunk road in Nigeria

Also in Nigeria, a new trunk road has been designed by Allott and Lomax of Sale, Manchester, to link the large market town of Ijebu-Ode in Ogun State, the university town of Ile-Ife, and the market town of Sekona in Oyo State. Commissioned by the federal government of Nigeria, the project is routed for 130 km across a remote tropical rain forest and virgin jungle.

Field survey work was carried out under supervision from the firm's team in Nigeria and the information passed to the design office for processing, using the in-house computer which produced nearly 300 drawings. The route crosses numerous streams and rivers requiring about 200 culverts and 13 major bridge structures – longest are the six-span River Oshun bridge and the River Shasha bridge. When completed, the new highway will form a major part of the Nigerian trunk-road development strategy opening up large agricultural areas to new and developing townships.

Brick plant collaboration

Allott and Lomax is also supervising the

[1]Further details are set out in the association's annual brochure 'Overseas work entrusted to members during 1977'.

Doing it properly

The whole world over British consulting engineers are engaged on construction works. As a body they are known and trusted by governments, public authorities and in fact by all who are concerned with construction, whether in the building sense or in the finding of capital money. In recent years their commissions have ranged from a mini-cab to the Bosporous bridge – with many larger and smaller.

The confidence they enjoy springs from two sources. Firstly they are known to be technically competent and experienced as individual specialists in a wide variety of engineering disciplines. Secondly they are respected for their professional integrity. It is only those able to satisfy the exacting requirements of The Association of Consulting Engineers on both scores who can be admitted to membership. Both qualities are disciplined, fostered and safeguarded through that governing body.

The Association is always ready to answer questions on the profession and to suggest the names of suitable members for any project. The client may be assured that his work will be entrusted to the specialist expert – and that it will be carried out properly.

THE ASSOCIATION OF CONSULTING ENGINEERS

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construction of Mena Abdullah, Kuwait, a silica-lime brick plant for the National Industries Company. Design of the civil engineering and building works was carried out in the firm's UK office and the project contains a wide variety of civil engineering work.

The plant includes brick presses housed in a steel-framed building, autoclaves, a horizontal rotary kiln, elevators, conveyors, and storage silos necessary to produce the 120 million bricks a year for which the plant has been designed. A limestone crushing plant produces 500 tonnes of lime for brickmaking each day. The project, which also includes workshops, storage sheds, offices and amenity buildings, is being built in three stages and the approximate value of the civil works is £12.5 million.

Building services

Combining with Allott and Lomax on this project for the design and supervision of engineering services is the firm Donald Smith, Seymour and Rooley. The work of the building services engineer continues to form an important element in the majority of projects. The demanding and extreme climatic conditions of high temperatures and variations in humidity present the building services engineer with a series of design problems which require the closest examination and collaboration with other professionals in order to achieve a satisfactory total design solution.

Among examples of these studies being undertaken by Donald Smith, Seymour and Rooley is that for the Jahra district centre in Kuwait. This is a mixed development of housing, commercial premises and four large multi-storey car parks, as well as numerous government and public buildings – town halls, theatre, library and offices.

The centre of the project is to be designed as a large pedestrian piazza and will contain a spacious mosque. In accordance with the master plan for the development of Kuwait, Jahra is to become the country's third largest centre and it is anticipated that with an annual population growth rate of 6 per cent up to 1990, the centre will house some 20 000 families with a total population of 130 000, or twice the present number. Design includes a large central chilled-water plant to serve the whole of the centre with facilities for future extension to neighbouring areas. The firm Donald Smith, Seymour and Rooley is the mechancial and electrical engineering consultants forming part of the consortium of British firms led by White Young and Partners.

Bed, breakfast and pyramids

Another collaborative example is the major tourist development now being planned as the Pyramid Oasis development on the desert plateau overlooking the pyramids at Giza. When completed, the Pyramid Oasis will be the largest residential resort development in the Middle East and will provide a unique choice of superior accommodation consisting of hotels, villas, apartments, recreational and entertainment facilities. Design requirements for the high and medium-voltage electricity supplies to the first-stage development of the site has been completed by Donald Smith, Seymour and Rooley and infrastructure work is now under way.

Demand for sophisticated buildings in Middle Eastern countries continues and Conseco International, along with British architects and quantity surveyors (see below), is engaged on the Petroleum Tower in Cairo. It is to house, under one roof, all Egyptian petroleum interests from the ministry down to the various oil companies. The top floors include an hotel which is reached by twin high-speed, glass-walled, double-decker lifts running outside the building, providing spectacular views of Cairo and the Nile. Other facilities are exhibition and conference halls, a library and a shopping arcade. The 150m-high tower is in the shape of an octagon, supported by a central octagonal concrete core, and carries a helicopter pad on its roof.

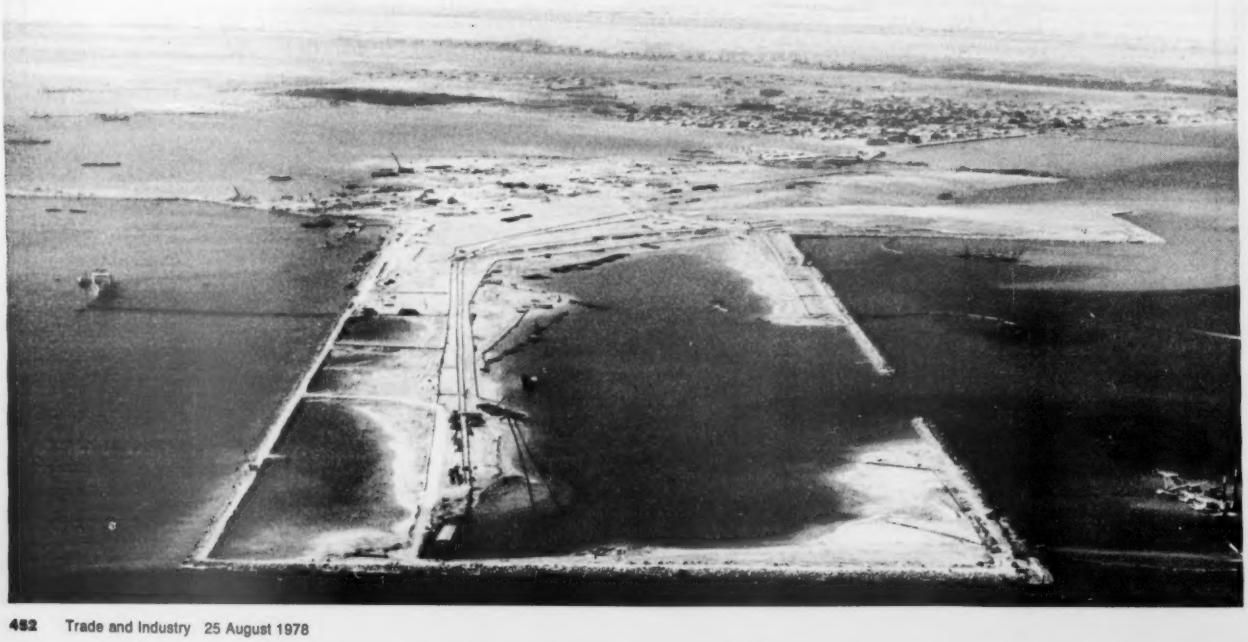
In Jeddah, Saudi Arabia, an interesting project by the same firm is a new headquarters and laboratories for the Directorate General of Mineral Resources of the Ministry of Petroleum and Mineral Resources. This is an important complex including administration and technical accommodation for the directorate and for three foreign research missions, (English, French and American) and an independent block for the minister complete with helicopter pad. A museum and mosque are also included. The complex has its own diesel generator plant to provide 100 per cent standby capacity in the event of main power failure.

The structure is in reinforced concrete and special emphasis is given to the finish in local stone and minerals to reflect the ministry's purpose. The 22-storey office block in Dubai, also by Conseco International, for Sheik Mansoor is of particular interest as it is the first time that slipforming has been used for such a building in Dubai. The 78m core was concreted in 28 days by pouring continuously, 24-hours-a-day. The tight programme of 19 months for construction necessitated the use of sophisticated plant and methods.

Jubail commercial harbour

The biggest project undertaken by Sir William Halcrow and Partners is the harbour development at Jubail, destined to grow from a small town on the coast of the Gulf into a major industrial estate with full port facilities. The plan provided for a massive twin harbour development, divided into a commercial and an industrial area, each to be evolved independently of the other. The commercial area was intended for general cargo, the industrial area would serve the industrial estate to house a complex of refineries, steel mills, an aluminium smelter and other heavy engineering installations.

Aerial view of dredging and reclamation works, Jubail commercial harbour.



The first two of the six separate contracts, dictated by the complexity and size of the project, were let during 1975, the rest within nine months, and the first two berths in the commercial harbour were ceremonially commissioned in December 1977.

The commercial harbour contracts – overall value £707 million at 1975 prices – involved construction of two breakwaters, a deep-water quay, substantial reclamation and, in all, 16 deepwater berths, including a two-berth container terminal. Following hydrographic studies, the 4 km-long east breakwater was aligned to protect the commercial harbour from the dominant wave direction, and equal care was taken in the protection of the relocated small craft and fishing harbour, to enable local fishermen displaced from their traditional berthing area to ply their trade in all weathers.

The industrial harbour consists of a northern breakwater, the alignment of which was determined by wave model studies, and a protecting arm, 9.5 km-long, constructed as a 300 m-wide causeway, which carries a road, conveyors, fire-fighting installations and a 50m-wide pipe track. It leads to a main finger quay which will hold nine berths, dredged to –14 m, intended to cater for the import of solid bulk cargo. The four berths are being provided along an open-sea tanker terminal, currently under construction, which will be connected to the causeway by a trestle carrying access road and pipe track.

A second finger quay nearer the shore has been completed. This is intended for salt barges and incorporates small-craft maintenance facilities and a slipway. Three of the deepwater berths will become operational this summer, the rest in 1979, along with the open-sea tanker terminal. Total value of this project (again at 1975 prices) is of the order of £713 million.

Cement works and steel plants

Work is nearing completion on a giant new cement plant near Oujda in north-eastern Morocco. Oscar Faber and Partners have combined with Blue Circle Industries Ltd in the overall design and have assumed responsibility for the whole of the civil engineering, including excavations, roads, railways, drainage, and all of the structures to house the mechanical plant. These include a large crusher house close to the limestone and clay quarries: raw material handling conveyors and stockpiles, a raw mill, preheater buildings, raw meal blending and storage silos, kiln piers and a firing building, clinker storage silos, a cement mill and packing and despatch facilities.

Finished cement is stored in 12 30 m-high cement silos, four of which are designed to load it on to the specially constructed rail link connecting the works and the main railway.

W. S. Atkins and Partners are well advanced on several major projects for the Venezuelan steel industry worth some £1,500 million over the next three years. The steel plant at Matanzas for Sidor (the national steel manufacturing organisation) is being expanded from 1.2 million tonnes to 5 million tonnes per year, based on direct reduction iron-making and electric arc steel-making, in order to use to the full Venezuela's natural resources of iron ore, natural gas and hydro-electric power. This follows the long-range planning study carried out in the early 1970s by Atkins for the development of the Venezuelan steel industry, on behalf of the Ministry of Central Co-ordination and Planning (Cordiplan).

Ports and docks

Last year saw the almost simultaneous completion of two major dry docks for which T F Burns and Partners was acting as consulting engineer – and both projects were finished on time.

The 150 000 dwt dry dock at Tuas Shipyard, Singapore, forms parts of a new ship-repair yard built for Keppel Shipyard Ltd, on a virgin site at the western end of Singapore Island. A finger pier and workshops were completed for the partial start-up of the yard after one year. The first vessel entered the dry dock three weeks ahead of the overall two-year programme.

The 500 000 dwt dry dock, which can be used for either shipbuilding or repair, is being built for Hellenic Shipyards Company at its Scaramanga yard in Greece. A construction period of three years was required due to the exceptionally difficult dewatering conditions. Techniques adopted by the contractors, including extensive diaphragm walling, proved very successful. Design and construction were carried out by a consortium supervised by T. F. Burns and Partners, who also designed the cantilever dock gate.

The level of the Caspian Sea has fallen by around 3 m in the last 30 years which has understandably created difficulties for the ports there. Bertlin Cooper Macdonald (a partnership of Bertlin and Partners and Cooper Macdonald and Partners) has been appointed to study the situation and devise alterations to the ports on the Iranian part of the sea to enable them to continue operating for a reasonable period. This problem is part of a general commission to advise on maintenance and repair for all the Iranian ports. The company has also been working within the Iranian Ports and Shipping Organisation for the last two years as advisors on the engineering aspects of a massive port development programme.

Construction contractors overseas

An annual article on the overseas activities of British construction contractors during the latest financial year, contributed by the Department of the Environment, will be published in *Trade and Industry* later this year.

Power and water

In 1973, John Taylor and Sons undertook a water resources survey of Mauritius for the Ministry of Overseas Development and prepared a master plan for the development of urban and rural water supplies for the island's 1.2 million future population. In 1975, the firm was appointed by the Central Water Authority, Mauritius, to engineer a £30 million capital works programme for its current five-year plan. It has designed a major multi-purpose project for the capital city of Port Louis, involving impounding reservoir, hydro-power station and water treatment works, all to serve a population of 150 000. In the rural areas, a major construction phase is about to begin to augment existing supplies. The firm is also very much involved in organising waste-detection activities in the urban distribution areas and in the training of operatives.

To meet the shortage of water and electricity in the state of Qatar, Charles Haswell and Partners was engaged in 1973 for the considerable civil engineering work to provide a large power and desalination plant near Doha. This project, the Ras Abu Fontas power and water station, was the subject of international tender and work on the first phase began in 1974, with the third phase beginning early this year. Civil engineering work comprises foundation and superstructure works for the turbine house, control building, workshops and numerous ancillary buildings. Foundations for the distillers, waste-heat boilers and switchyard, together with major works to the sea-water intake and outfall, bring the total capital value of the civil engineering works to approximately £100 m. On completion in 1981, the generating capacity of the station will be some 700 MW.

Locating water mains, Port Louis, Mauritius.

Architects

This survey by the Royal Institute of British Architects shows that, despite a cut-back in construction work in many countries, British architects made a valuable contribution to invisible exports. There is growing evidence that the standing and integrity of British consultants has been more widely acknowledged. While in previous years the Middle East has provided the bulk of the work, architects' activities now span many countries and several continents.

In Eire, the arts building for Trinity College Dublin, completed in January this year by Ahrends Burton and Koralek, has attracted very favourable comment. Three faculties, with almost 4000 staff, graduates and undergraduates, are housed in the new building along the Nassau Street boundary of the college.

Ardin and Brookes not only has an hotel nearing completion and a cinema under construction in Ras Al Khaimah, but a number of projects to its credit in Doha, elsewhere in Qatar and in North Yemen. In Bahrain, two architects from the practice are seconded to the Ministry of Housing working on housing designs and layout.

Ibelart, the Spanish subsidiary of the BEP Partnership, was commissioned to design and supervise an industrial warehousing complex for Mackenzie-Hill (later absorbed by a Banco de Vizcaya subsidiary). The complex, in a major industrial estate on the outskirts of Madrid, was erected on a 22-acre site. The project itself measures 47 500 m² in two phases, and the first has now been completed. This is on two levels so as to make the best use of the natural slope of the site.

Prize-winner in a master planning competition for the development of the Port Saeed District Centre in Dubai is a joint team of British architects, planners, engineers and economists from the John S. Bonnington Partnership and John Laing Design Associates . Competing consultants were required to make a comprehensive town planning study to assess and evaluate all the physical, economic and social issues involved.

The heart of the Bonnington/Laing design is the commercial core comprising shopping centre, theatre, cinemas, offices and restaurants, and a street market, planned adjacent to a new canal which brings the maritime character of the Dubai waterfront into the centre of the development. Balancing these commercial facilities in the heart of the district are the new cultural buildings – an Islamic cultural centre and mosque, state library, and museum and art gallery, located on a landscaped island formed by the creation of the new canal and the existing creek.

In Qatar, John Bonnington has also designed Doha zoological gardens to provide educational interest and information in a pleasant recreational atmosphere with formal and leisure gardens.

The firm Brewer Smith and Brewer Maxwell has been working in Canada on the major redevelopment of a large teaching hospital, as well as other health care and medical research buildings. In Australia, the firm is developing a major specialist hospital for paediatric medicine including research and teaching facilities. The ability of British practices to work in this way in sophisticated countries, underlines the high esteem in which they are held in other parts of the world.

Another member of the group, Brewer Smith and Brewer Gulf, has completed schools, offices, banks, villas and shops in Dubai and Abu Dhabi as well as the architectural planning and detailing of the Marbella Club in Sharjah.

James Cubitt and Partners has completed the first three phases of the University of Garyounis at Benghazi and phase 2, providing 2400 beds in the student residential accommodation at Al-Fateh University in Tripoli, Libya. Two other major buildings have been completed in Nigeria – the conference centre at the University of Ife and a large office block at Lagos.

Clifford Culpin and Partners was lead consultant for the Ismailia demonstration projects, which were commissioned in May 1977 by the Ministry of Housing and Reconstruction, Egypt, and the British Ministry of Overseas Development. The purpose of the projects was to illustrate in detail the principal policies initially developed in the master plan, in particular the housing policies for Ismailia, and in effect to pave the way for their early implementation, which began last month.

Robert Fawcett, with its specialist consultancy into building methods, was appointed by the government of Bahrain to advise on its housing programme. The firm is also undertaking work for many overseas companies in Italy, Iran, Abu Dhabi, Nigeria, Saudi Arabia, Jordan, Algeria, Sudan and Libya.

Fry Drew Knight Creamer have major projects under construction in Mauritius and the Gambia: the government centre and the registrar's building, both in Port Louis, are due for completion in 1979; the new terminal building at Gambia's Yum Dum international airport features simple low-cost structures, and Brikama college of further education starts this year.

Hotel work has been the speciality of Garnett Cloughley Blakemore who have a high volume of projects overseas. The Delmont Hotel in Bahrain, Mena House Hotel, Oberoi, Cairo, and the Beach Plaza Hotel, Monte Carlo are all receiving the GCB touch.

At Mombasa airport in Kenya the GMW Partnership was involved in the planning exercise and placed particular emphasis on passenger facilities and building design. The airport is now under construction and is due to complete this autumn.

International hospital planning consultant Donald A. Goldfinch Associates has continued the extensive programme of hospital projects for which it has been commissioned in the Mediterranean area and the Middle East. These commissions are for a multidisciplinary approach embracing feasibility study, full design, construction and engineering services, equipping and commissioning.

Following completion of the Dr Fakeeh

Prize-winning design for Port Saeed.

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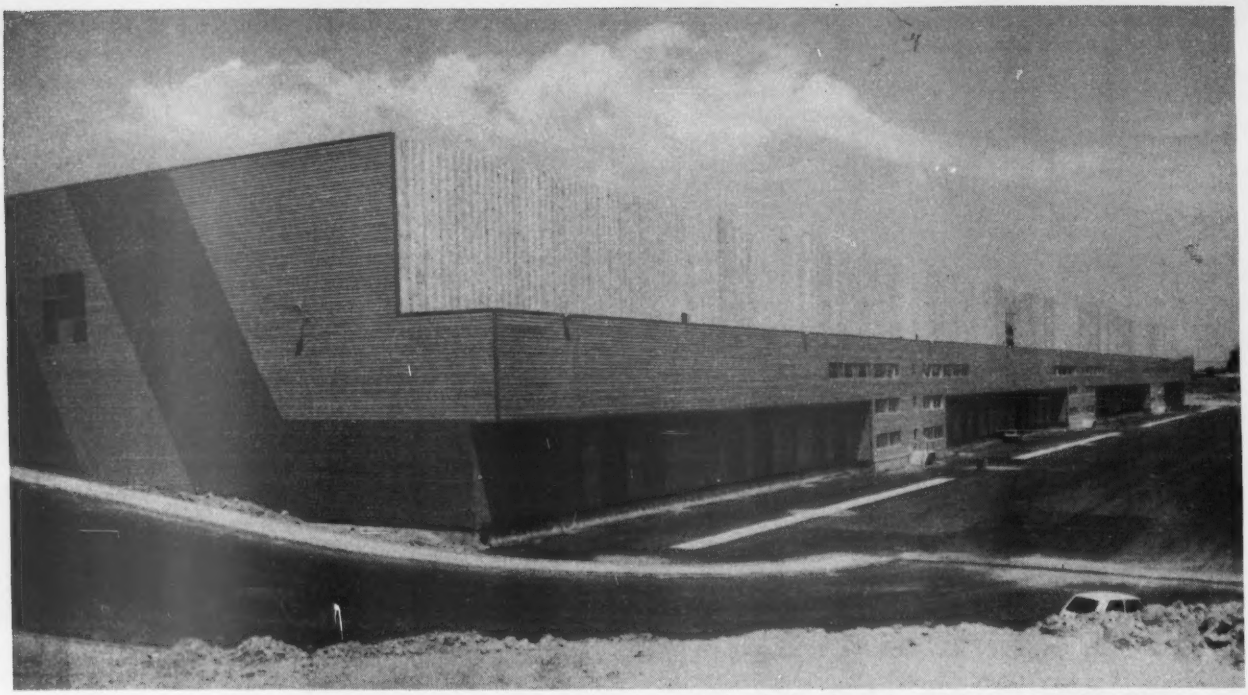


Mackenzie-Hill industrial warehousing complex on the outskirts of Madrid, designed by Ibelart, Spanish subsidiary of the BEP Partnership.

general hospital in Jeddah, Saudi Arabia, the Bugshan maternity and paediatric hospital of 100 beds (Dr Hassan Badrek) is nearing completion after a contract period of 12 months, while the Al Fatani general hospital of 305 beds, together with a fully automated check-up clinic facility, has recently commenced construction in the new Jeddah area.

Construction work on the 60-bed Al Salam hospital for Professor Dr Fathi Iskander at Agouza, Cairo, is progressing well in collaboration with architect Fahmy Fouad, and the consultant services for equipment and commissioning are well-advanced.

The paediatric hospital and day surgery centre is under construction in Athens, in collaboration with Architect A. Tombazis, and the feasibility study and design for a new district general hospital in Greater Athens is in the course of preparation.

The Dubai Hilton, one of the largest in the Middle East, is part of the Dubai international trade and exhibition centre. The vast complex includes a39-storey tower block, which is the tallest building in the Arab world, and was designed by John R. Harris. In addition to the tower, there is the exhibition hall and 500 furnished apartments built in three 15-storey blocks. The development is being completed in phases with the final completion during mid-1979.

The first section of the development is the hotel which was opened by the Ruler on 18 March this year. It is managed by Hilton International and known as the Dubai Hilton. The amenities include 331 bedrooms, 11 suites, five royal suites, a restaurant, cocktail bar, coffee shop, sauna, swimming pool and pool snack bar.

Hughes and Polkinghorne, in association with Arabian Design Associates, has several main projects currently under construction, including two multi-storey office blocks in Doha, and five urban health centres also in Qatar.

The first headquarters building to be commissioned by one of the EEC institutions, the European Investment Bank in Luxembourg, has been designed by Denys Lasdun Redhouse and Softley and is now under construction for completion next year.

Llewelyn-Davies Weeks continues its overseas work in the Middle East and South-east Asia. In Bahrain, the new Salmaniya medical centre, a 1550-bed general hospital, acting as a focus for Bahrain's health services, is nearing completion. The firm was retained to select, specify and prepare tender documentation for all medical equipment for the hospital. Also in Bahrain, work continues on the construction of the school of business studies for the Gulf technical college. In Doha meanwhile, Llewelyn-Davies Weeks is working on two projects: the Hamad general hospital and the Doha city development plan.

In Singapore, the general hospital, designed by the firm in 1974, will house 1500 new beds and incorporate a further 600 beds of the existing hospital when completed. And construction is well under way. The first phase, comprising the rehabilitation and accident and emergency departments was opened for clinical work during 1976. In north-east Thailand, the first major phase of the 500-bed teaching hospital and medical school for the University of Khon Kaen is now being built. In Adelaide, South Australia, the third phase of the Flinders medical centre, planned by the firm in 1971, is under construction. The first two phases have been occupied progressively since 1975.

On the planning side, the firm has a large team based in Oman providing the government with assistance in plan and policy-making, liaison and implementation advice; planning management systems; and training. This long-term project is helping to establish the framework for the country's future administration of planning matters. In the Philippines, work is continuing on the second stage of the Dagat-Dagatan sites and services project.

Mathews Ryan and Parnters have recently been appointed by the Municipality of Tripoli for the design and supervision of zoological and botanical gardens, with separate facilities for sport and recreation. The project, which is still at a preliminary stage of design, is to be located on the outskirts of Tripoli at Nasr forest, which covers some 240 hectares of mature eucalyptus and conifer forest.

Among a number of overseas projects completed by Robert Matthew, Johnson-Marshall and Partners is the Sharjah sports club, comprising a grassed football pitch, eight-lane swimming pool, sports hall with squash courts, gymnasium and associated social facilities. The large community development for between 26 000 and 30 000 people, which is being completed near Tripoli, includes community buildings and schools, as well as 5000 dwellings. New Glendon hospital, Montserrat, West Indies, provides 67 general beds for medical surgical obstetric and paediatric purposes with full back-up facilities. The firm is also engaged on a study for the provision of public transport in Jeddah, Mecca and Medina for the Ministry of Communications, Saudi Arabia.

Morrison Design Partnership has work under construction or at final design stage at Tabriz (a foundry) and Bandar Pahlavi (300-bed hotel) in Iran, and at Jeddah (500-bed hotel), Abu Dhabi (300-bed hotel), and Kuwait (500-bed hotel). In addition, work in Australia includes the headquarters of the Amalgamated Engineering Union.

The phased completion of the government centre in Taif, designed by Sir Leslie Martin and David Owers, continued this year with the handover of accommodation for the Council of Ministers, following the occupancy of 18 ministry units in June 1977. Planned growth for the summer headquarters includes completed designs for an additional nine ministries and for a new mosque.

Philip Pank has four major schemes in Iran Comiran Shiraz apartment complex; the

housing colony for Neka power station, Mazandaran, the club for Tavanir power station; and Comiran Sari apartment complex at Mazandaran, which is due to complete this autumn.

Pearson International has teaching hospital projects at Damascus, Syria and Ilorin, Nigeria.

In Bermuda, Mountford Pigott Partnership has carried out extensive work. The most recently completed project is the Barclays international building, headquarters of the Bermuda Provident Bank in Hamilton, and formally opened by the governor of Bermuda in October 1977.

JDP Consultants (Salmon Speed Associates) has completed a much-acclaimed development of 100 houses for the ruler of Ras Al Khaima. Intended for use by either arabs or expatriates not in low-income groups, the buildings have high standards of finish.

The Dubai leisure centre and Magic Fruit Garden, designed by SBT Middle East, the overseas practice of UK architects Scott, Brownrigg and Turner, is now nearing completion, with the opening to the public anticipated later this year. This is the most modern major leisure complex in the Gulf area, containing an ice-skating rink and a comprehensive variety of facilities for sports and leisure activities, all sited within the grounds of the old Al Nasr club. The new football stadium, also built within the grounds of the old Al Nasr club in Dubai was officially opened at the end of May, with a celebratory match between Liverpool and the Al Nasr team. The trade centre in Abu Dhabi, United Arab Emirates, commissioned by Sheikh Suroor Bin Mohammed Al Nahyan, is now under construction and the firm has also designed and is supervising the erection of a £3 million radio transmitter station at Al Khaisah, Doha.

Shepheard Epstein and Hunter has several overseas projects. Working as specialist consultant to the University of Tlemcen, Algeria, they are designing a university library for the University of Ghana, and a lecture block, library and faculty building for the University of Louvain-Le-Neuve in Belgium.

Slater Hodnett and Partners has two identical sports and recreation centres under construction at Jeddah and Dammam for the Saudi Arabian presidency of youth welfare. They provide for a wide range of sporting activities.

In Bahrain, Raglan Squire and Partners has now completed the Ramada Hotel.

George Trew Dunn Beckles-Willson Bowes has designed a number of finished buildings in the Gulf: two supermarkets in Bahrain and Sharjah, and a bank in Manama. The most intriguing is the Sulman purpose-designed breeding centre for hunting falcons, the first in the Arab world, completed in January this year for Sheikh Hamad bin Isa Al Khalifa, heir apparent of Bahrain.

In addition to the Wasia water treatment plant and complete village near Riyadh, Yakeley Associates are involved in two separate high-rise developments in the Saudi Arabian national housing scheme at Jeddah. These total 5760 flats and are expected to cost £550 million.

In Egypt, YRM International is finalising the detail design of the Petroleum Tower in Cairo. The firm was appointed architect and team leader for the project in collaboration with Dr Galal Moemen and Sons of Cairo. The 42-storey office building, to be built near the El Galaa Bridge over the Nile, has been designed as an octagon to maximise the view upstream and downstream and reduce the overshadowing effect on adjoining sites. Construction is due to start next year.

Surveyors

Services of members of the Royal Institution of Chartered Surveyors are still much in demand by overseas clients on a wide range of projects, ranging from surveys and mapping for development to the planning and cost control of construction projects and their subsequent management.

During the past 12 months, British-based survey and mapping organisations have been working throughout the world on a wide range of projects and a number of major contracts has been won in the Middle East.

One of these, valued at over £3 million, involves the air-photography, land surveys and mapping required to evaluate the land and water resources of the eastern region of Saudi Arabia. The work is expected to last nearly three years and some 20 land surveyors will be involved on site. Another Saudi Arabian contract, awarded by the Ministry of Petroleum and Natural Resources and valued at £1.25 million, is for mapping 110 000 km² of the south Shammar region. In the United Arab Emirates, a British firm has won a £1.5 million contract to undertake geophysical surveys and geological mapping for the Ministry of Petroleum and Mineral Resources.

Other Middle East projects on which chartered land surveyors have been engaged include large-scale ground surveys for new and improved road schemes in the UAE; surveys for motorway projects in Kuwait; feasibility surveys for a new dam project and ground and hydrographic surveys for a new industrial project in Saudi Arabia; and major control surveys, large-scale ground surveys, and map up-dating for the Tehran/Tabriz railway project in Iran. A UK firm is also providing support services for the Royal Navy hydrographic survey of Iranian waters. In Libya, a £1 million contract has been won to provide the geodetic network of Benghazi covering 100 km².

Projects in Europe include an airborne survey to assist in the location of uranium deposits in northern Italy and the award of a long-term contract to provide the survey staff required by Cern to monitor sub-atomic particle accelerator guidance systems. British land surveyors are also carrying out astronomical surveys in connection with the international observatory project in the Canary Islands.

As always, the year has seen considerable British land-survey involvement in Africa. In addition to providing services on various projects in Nigeria, contracts have been awarded for carrying out an annual hydrographic survey to determine siltation and check dredging surveys at Port Kamsar (Guinea-Bissau); airborne geophysical surveys for mineral and oil exploration in Madagascar; proving surveys for microwave routes linking Mozambique, Zambia, Malawi, Tanzania and Burundi (a project commissioned by the International Telecommunications Union); plantation surveys in the Ivory Coast; and aerial and ground surveys for major irrigation schemes in Somalia.

Feasibility surveys for a hydro-electric scheme in Samoa were undertaken by a British firm and British land surveyors carried out the special 'wriggle surveys' in connection with the Hong Kong mass-transit underground railway to assist tunnel alignment. The Hong Kong mass-transit system is only one example of a project in which chartered surveyors in several disciplines have been providing services. Another is the Rahad irrigation project in Sudan, where land surveyors and quantity surveyors have been involved. The value of the building contract alone, with QS services provided by a UK firm, was just under £26 million.

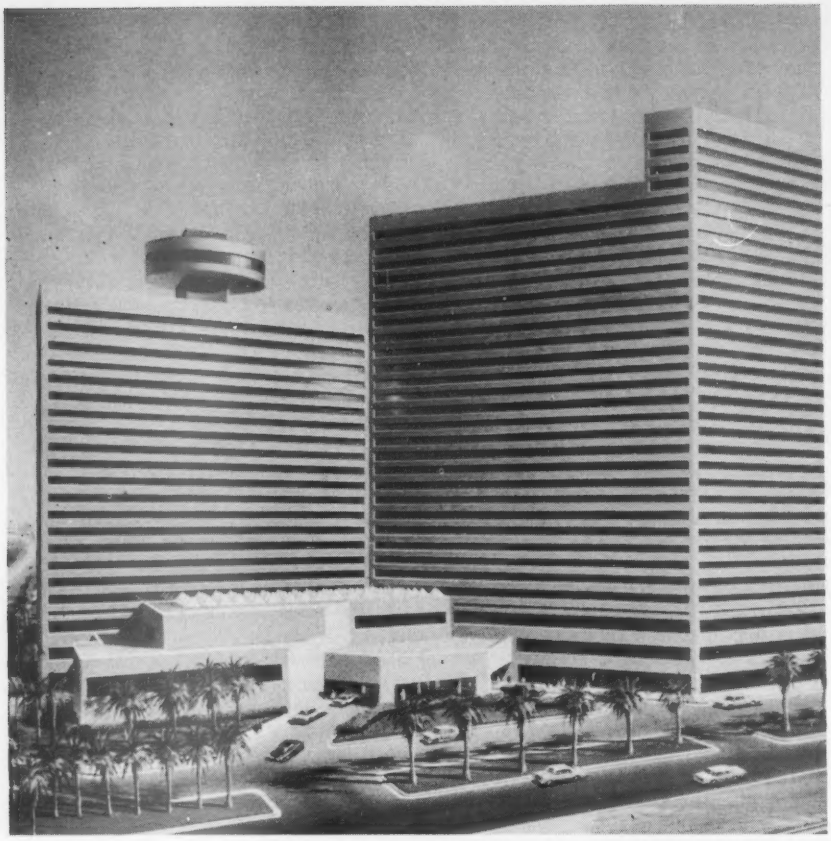
As part of a planning assistance project financed by the United Nations development programme, chartered quantity surveyors are currently advising the Sudanese Ministry of Construction and Public Works on the development of the country's national building programme. International aid agencies and countries which until recently have had little first-hand knowledge of QS skills and services, are beginning to appreciate that these can assist in programming and controlling construction costs. To help ensure that budgeted resources are utilised to maximum benefit, government departments and parastatal organisations in several countries, including Saudi Arabia and Iran, are now employing British quantity surveyors.

The Middle East continues to offer good prospects for chartered quantity surveyors.

Projects in the UAE, where cost consultancy and QS services are being provided, include three new gas liquefication plants, the £600 million national assembly hall and the £10 million trade centre in Abu Dhabi; hospitals, sports centres and the new sports city in Dubai; the £47 million Galadari corniche hotel and apartment complex in Dubai; and several multi-million shop/office/residential developments in Dubai and Sharjah.

In Qatar, UK-based firms are involved in the development of the £17 million fourth phase of the naval base; a radio transmitter station and radio studios (total contract value approx £7.5 million); accommodation for the Qatar Steel Company (an £8 million contract); a swimming pool and assembly rooms for the state of Qatar; and a number of prestige office blocks.

British quantity surveyors are acting as cost consultants for the £100 million sports city in Saudi Arabia; they are also providing QS services on the £7.5 million Holiday Inn hotel development in Jeddah. A QS firm is a member of the UK team which is advising on design, building and engineering works at a postal complex in Riyadh; another has been called in to advise on performance specifications for post office works and television centres which the French



Artist's impression of the Hyatt hotel, part of the Galadari corniche complex in the UAE, where British quantity surveyors have been appointed cost consultants.

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government is undertaking in Saudi Arabia on behalf of the Saudi government.

Egyptian contracts on which QS services are being provided include a £14 million hospital and Cairo's new 42 storey petroleum tower (see page 457). British firms are acting as quantity surveyors for the £14.5 million Gulf Hotel in Bahrain; for the £100 million Jahra district centre in Kuwait which, when fully developed, will be Kuwait's largest centre with a population of 130 000; and for the Kuwait Oil Company's new industrial training centre.

In north Africa, chartered quantity surveyors are part of the British consortium which won a contract to carry out feasibility studies and outline master plans for airports at Tobruk and Labraq and QS services are being provided on the new university complex which is being developed in Tlemcen, western Algeria.

QS involvement in Europe includes project management of a warehouse development in Germany, cost advice on an £8 million hospital redevelopment in Spain and the provision of quantity surveying services on Marks and Spencer's new Paris store.

There has been considerable QS activity in the Far East as well as in Africa, including the involvement of firms of chartered quantity surveyors in the development of the airport in Lilongwe (Malawi) and in the proposed new airport in Cameroun.

Several firms have taken on assignments in south America during the past 12 months, particularly in Venezuela where UK-based firms are now starting to establish local offices and to provide cost consultancy services, mainly for Venezuelan clients.

In the field of land administration, chartered surveyors have expanded their north American and Middle East activities and have continued to provide a wide range of services in other parts of the world, including Europe. Property investment is on the increase in Canada and in the United States; several firms of chartered surveyors are now firmly established as expert advisers to British, as well as Canadian and American, insurance companies and pension funds which are currently seeking investments in north America. The amount of American business has been sufficient to warrant the opening by one firm of an office in Los Angeles only three years after first establishing itself in New York.

New offices have also been opened in the Middle East where local clients are appointing chartered surveyors to advise on property development and investment matters, including carrying out feasibility studies for new construction projects.

The main centres of activity in Europe continue to be Belgium, France, Germany and the Netherlands, where chartered surveyors are advising on the development, purchase, letting and sale of industrial and commerical properties for a wide range of international clients. One contract awarded to a British firm involved the sale of a site on a UK-developed trading estate in Belgium to Russian car importers and distributors – a somewhat unusual assignment with the negotiations carried out largely in Russian.

In addition to their activities in the property field, which is becoming increasingly concerned with providing management advice to international clients on their worldwide property investment portfolios, British chartered surveyors have also been retained to undertake planning studies and evaluate development plans. Valuation of assets for financial and insurance purposes is another activity in which chartered surveyors are becoming increasingly involved. Assignments have ranged from cyclone damage assessment for government and private clients in the Far East to appraisals for fire insurance and security purposes for European and American companies in Europe, Africa, the Americas and the Far East.

During the past year, RICS delegations have visited the World Bank, the United Nations (including UNDP) and the Inter-American Development Bank to discuss the extent to which chartered surveyors can provide services on project funded or executed by these major aid and development agencies. The relevance of chartered surveyors' skills to projects financed by the European development fund was also discussed during the course of an RICS promotional visit to the EEC commission earlier this year.

Nor have opportunities for the profession to expand its activities in south America been overlooked. RICS was represented at a symposium on the reduction of housing costs organised by the National Housing Bank of Brazil in March 1978. Afterwards one of the chartered surveyors present at the symposium called on senior officials in 13 Brazilian state and federal organisations concerned with rural and urban development programmes.

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British agriculture abroad

May this year appears to have been a fairly busy month for British exporters of agricultural products, with visits to Tanzania and to Yugoslavia sponsored by the British Agricultural Export Council (BAEC) and financially assisted by the British Overseas Trade Board. Reports on the missions, now available, should provide valuable background for anyone interested in trading in this sector, offering a first-hand practical view of the two markets.

Since the closing of the Kenya/Tanzania border in 1977, foreign companies have been obliged to discontinue their practice of operating their east African interests from one centre, often Nairobi. As a result, business visits to Tanzania have increased, to reveal the potential of this developing market.

Yugoslavia, on the other hand, is an already well-established UK trading partner, but according to BAEC there are still ample opportunities for expansion: With this in mind, they organised a mission to the Novi Sad Fair as a follow-up to a previous mission in 1977.

As with earlier reports, produced on Bolivia, and Peru (see *Trade and Industry* 23 September 1977, page 542) and Brazil, Ghana and Nigeria (see *Trade and Industry* 12 May 1978, page 303) the publications not only provide a mass of useful market data, they contain some excellent background statistical information and lists of contacts in both the country concerned and the UK.

Tanzania: a report for agricultural exporters. British Agricultural Export Council, 35 Belgrave Square, London SW1X 8QN. 1978. 32 pages; paperback, £4.00.

Yugoslavia: export opportunities in the food and agricultural sectors. BAEC. 1978. iii, 49 pages; paperback, £3.00.

Yugoslavia: the report of a follow-up mission. BAEC. 1978. 34 pages; paperback, £3.00.

Putting a figure to it

Against the general downward trend of Britain's mineral production in recent years, the spectacular rise of North Sea oil is highlighted in the Institute of Geological Sciences' 'United Kingdom mineral statistics 1977'. This fourth edition of a publication which first appeared in 1973 brings together statistics from a variety of sources provided by companies, trade associations and government departments.

This survey of minerals and mineral-based products puts the role of mining and quarrying into perspective as far as the UK economy is concerned. For the first time since 1938, official figures on 'end use' of minerals have been produced and these have been included in the section on mineral production.

The section on trade describes the contribution of minerals to the UK's overseas trade and the balance of trade in minerals, as well as providing import and export figures for individual commodities. There are detailed reviews of selected commodities and some useful maps and diagrams followed by a summary of production, consumption and trade.

This survey will be of particular use to economists and students of the British economy, as well as to those involved in the mineral industry, and industries which extensively use mineral-based products.

United Kingdom mineral statistics 1977, by the Institute of Geological Sciences. HMSO. 1978. viii, 156 pages; paperback, £10.25 (ISBN 0 11 884015 0).

Patent Office publications for industry

The Patent Office offers industry a wide range of publications. These include the Official Journal (Patents), the Trade Marks Journal, British Patent Specifications, Illustrated Abridgements of Patent Specifications, Reports of Patent, Design and Trade Mark Cases, and 50-year subject matter file lists of British patent specifications. Details of these and other publications may be obtained by post from Sale Branch, the Patent Office, Orpington, Kent, BR5 3RD, or by personal application at the Public Sale Counter of the Patent Office, 25 Southampton Buildings, London, WC2.

Managing big brother

We are all affected by the use of computers in one way or another, yet there are still many offices where the 'dread' machine has not penetrated. With enormous reductions in real costs of computing over the past two decades and the ever developing microprocessing industry, it won't be long before computers will be making their presence felt in each and every administrative environment. Those who are about to have to deal, for the first time, with computerised applications will be grateful for a straw to clutch at in the form of a simple basic manual of concepts and jargon.

A small booklet recently published by the Institute of Chartered Accountants sets down in ten simple stages the points to be considered by a manager considering the introduction of a computer system. Written primarily for those introducing a new purpose-built system, the basic principles discussed will apply to the introduction of any computer package.

Each stage is outlined clearly with reference to the specific responsibilities of the manager. Also included in the text are examples of actual problems that could arise.

At the end of the booklet are summary tables of the various progress stages with a note of documents required at each stage, together with a set of project planning and control standards.

For the uninitiated, who may view the introduction of the computer with some apprehension, or for those who may wish to face computer professionals with a little more ammunition, this handly booklet should prove good value.

Computer systems: a basic guide for managers, by S M St John, Publications Department, Institute of Chartered Accountants in England and Wales, PO Box 433, Chartered Accountants' Hall, Moorgate Place, London EC2P 2BJ, 1978. 20 pages; paperback, (ISBN 0 8529 198 X).

Costing – 10 years on

It is now 10 years since publication of the first edition of 'An engineer's guide to costing' and during this time the importance of sound production and management techniques has become even more vital. 'It is obvious,' said the introduction to the first edition, 'that sound production planning and management are essential if an adequate level of profits is to be attained'. This is obviously as true today as it was then, perhaps even more so with increased competitiveness in both home and world markets.

Now in its second edition, the book, which is produced jointly by the Institution of Production Engineers and the Institute of Cost and Management Accountants, has been revised and expanded to take into account recent developments. Among additional sections are chapters on management and inflation accounting and asset management. The section on business ratios has also been expanded.

An engineer's guide to costing. Institution of Production Engineers and the Institute of Cost and Management Accountants. Available from the Institution of Production Engineers, Rochester House, 66 Little Ealing Lane, London W5 4XX. 1978, 90 pages. £3.50 (£3.00 to IPE members) ISBN 0 85510017 6).

Guide to export services

Now available to exporters and those considering entering the export market, the 'Export services handbook' covers products and services available, from government and non-government organisations. It replaces the 'Export handbook' which was published in 1975. Copies can be obtained from the Publications Sales Unit, British Overseas Trade Board, Export House, 50 Ludgate Hill, London EC4M 7HU, or through BOTB regional offices, price £2.50 plus 30p for packing and postage.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers	Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index	1970											
Series in		£ million	£ million				£ million				£ million	
Stock level at end-1977						18,845 p	10,762	1,938	1,946			
1971	101.7	32 677	9 625	1 988	1 922	112	−148	52	18	1 074	279	795
1972	104.0	34 519	9 636	1 721	2 035	35	−145	48	15	126	−701	827
1973	110.8	36 132	10 233	1 730	2 377	1 365	597	102	379	−883	−2 354	1 471
1974	109.1	35 682	10 001	1 964	2 300	561	634	81	−109	−3 515	−5 195	1 680
1975	107.3	35 269	9 640	1 695	1 921	−842	−429	−111	−65	−1 617	−3 205	1 588
1976	109.8	35 406	9 444	1 633	1 900	97	5	23	9	−859	−3 510	2 651
1977	110.9	35 116	9 087	1 764	2 081	444	234	108	17	165	−1 612	1 777
1976 2nd qtr.	109.3	8 793	2 346	400	468	−12	−66	−20	−45	−281	−909	628
3rd qtr.	109.6	8 879	2 377	414	488	5	−2	14	16	−304	−1 097	793
4th qtr.	111.3	8 928	2 343	422	496	105	73	3	5	−279	−961	682
1977 1st qtr.	110.5	8 758	2 259	419	502	234	125	51	102	−493	−947	454
2nd qtr.	110.9	8 639	2 292	433	508	229	164	39	−5	−365	−764	399
3rd qtr.	111.1	8 829	2 265	456	530	−30	−31	5	−44	537	54	483
4th qtr.	111.2	8 890	2 271	457	541	11	−25	13	−36	486	45	441
1978 1st qtr.	112.1	9 084	2 245 p	446	548	249	125	53	61	−305	−574	269
2nd qtr.		9 100 pe							85	221	−139	360
% change last 2 qtrs. on prev. 2 qtrs.	+0.6	+2.6	−0.9	+1.6	+4.9							
on a year earlier	+0.7	+4.5	−1.9	+7.4	+9.1							

	Industrial production		Personal expenditure		Prices and earnings				Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payment basis	
	at 1970 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index	1970	1970	1971		Jan. 1974		1970	1970	Jan. 1970				1975	1975
£m in base year			16,296										19,462	22,667
Series in				thousands						thousands		thousands		
1971	100.1	99.4	100.0	108.5	80.0	9.4	104.6	109.0	118.7	775.8	3.4	130.9	84.6	83.3
1972	102.3	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.0	854.9	3.7	147.3	84.5	92.4
1973	110.0	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.1	611.0	2.6	307.0	96.8	105.6
1974	106.3	108.9	109.0	102.8	108.5	16.0	215.3	152.0	179.1	599.7[1]	2.6[1]	302.7[1]	103.9	107.9
1975	100.6	102.2	106.7	97.2	134.8	24.2	235.4	188.7	226.6	929.0	3.9	150.0[1]	100.0	100.0
1976	101.4	103.2	106.5	104.7	157.1	16.5	299.0	219.6	261.9	1 269.8[1]	5.4[1]	120.4[1]	109.9	105.5
1977	102.7	104.0	103.6	107.1	182.0	15.8	340.1	261.7	288.5	1 378.1	5.8	155.6[1]	118.9	107.0
1977 1st qtr.	103.4	105.5	103.3	104	174.1	16.5	341.5	248.0	280.0	1 329.5	5.6	..	115.7	109.1
2nd qtr.	102.1	103.2	102.5	103	181.9	17.4	347.7	259.2	285.3	1 340.6	5.6	157.7	118.0	109.8
3rd qtr.	103.0	104.0	104.3	112	184.7	16.5	340.5	267.7	288.3	1 414.6	5.9	151.9	124.1	106.4
4th qtr.	102.4	103.4	104.4	110	187.4	13.1	330.6	272.1	300.4	1 427.8	6.0	160.1	117.9	102.6
1978 1st qtr.	103.5	103.8	106.3	129	190.6	9.5	326.7	279.0	310.8	1 409.4	5.9	187.7	120.3	114.3
2nd qtr.	104.3 p	104.8 p	108.0		195.8	7.7	340.7	284.6		1 372.7	5.7	210.3	122.6	110.0
1977 Aug.	103.0	103.8	104.7	116	184.7	16.5	338.8	268.1	287.7	1 410.3	5.9	153.4	123.4	101.3
Sept.	102.8	103.7	103.5	107	185.7	15.6	338.1	269.2	291.0	1 434.9	6.0	147.2	125.9	107.5
Oct.	102.1	103.1	102.7	116	186.5	14.1	333.8	271.0	295.8	1 431.5	6.0	156.0	119.4	101.3
Nov.	102.0	102.7	103.1	108	187.4	13.0	329.9	272.0	300.5	1 429.6	6.0	159.4	115.3	98.4
Dec.	103.1	104.4	106.9	104	188.4	12.1	328.0	273.3	304.8	1 422.3	6.0	165.0	118.9	108.1
1978 Jan.	103.2	103.5	104.9	125	189.5	9.9	324.9	277.1	306.3	1 419.2	5.9	180.3	112.2	114.6
Feb.	103.7	103.7	106.8	120	190.6	9.5	324.2	279.2	311.2	1 409.0	5.9	187.0	127.4	111.3
Mar.	103.5	104.4	107.0	142	191.8	9.1	331.0	280.6	314.8	1 400.0	5.9	195.8	121.4	116.9
Apr.	105.4	105.8	106.7	132	194.6	7.9	337.4	282.7	325.7	1 387.1	5.8	203.7	125.9	104.1
May	103.3	103.6	108.4	124	195.7	7.7	341.5	284.7	327.2	1 366.4	5.7	209.9	119.9	114.1
June	104.2 p	105.0 p	108.6	133	197.2	7.4	343.1 p	286.3 p	333.8 p	1 364.7	5.7	217.4	121.9	111.9
July			110½ p		198.1	7.8	340.2 p	288.7 p		1 371.4	5.7	211.0	126.9 p	117.1 p
% change latest 3 months on prev. 3 months	+0.8	+0.9	+2.2	+0.5	+2.4		+3.2	+2.0	+5.8	−2.2		+8.8	−1½	+3
on a year earlier	+2.2	+1.6	+5.6	+25.9	+7.6		−1.3	+9.1	+15.3	+0.4		+35.0	+2	+2½

p Provisional pe Preliminary e Estimate .. Not available [1] Average of available months

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UK air trade: value reaches nearly £11 billion in 1977

The value of UK trade – exports and imports together – by air, on an Overseas Trade Statistics basis, increased between 1960 and 1977 from £444 million, 5½ per cent of total UK trade, to £10,973 million, 15½ per cent of total UK trade.

During this period exports by air increased from £230 million to £5,693 million, while imports by air rose from £214 million to £5,280 million. The importance of trade by air has increased in most years, with the exception of 1974 when the sharp rise in the value of oil imports (which arrive by sea) led to a fall in the proportion of air imports in the total of nearly 2 percentage points.

Exports by air in 1977, at £5,693 million, accounted for 17 per cent of total exports, little changed from 1976, while imports by air, at £5,280 million, accounted for 14 per cent of total imports, compared with 13 per cent in the previous year. As shown in table 1, the value of exports by air increased by 29 per cent in 1977 and imports by air were up by 27 per cent, compared with a 27 per cent rise in total exports and a 17 per cent rise in total imports.

Total trade (table 1 and 1a)
Comparison of the tables illustrates that air trade is naturally concentrated in items which have a high value to weight ratio. Air exports in 1977 accounted for 17 per cent of total shipments by value, but by weight they were less than ½ per cent of total shipments. For imports, the corresponding figures are 14 per cent and one-tenth of 1 per cent. Thus, the value per tonne of our export trade by air in 1977 was about 40 times that for total exports, while for imports the corresponding figure is about 120. By weight, there were marked increases in exports in total and by air between 1976 and 1977 of 26 per cent and 16 per cent, respectively. In contrast, the weight of total imports fell by 12 per cent, although air imports rose by 3 per cent.

Exports by commodity (table 2)
Approaching one-half of the £1,278 million rise in the value of exports by air in 1977 was due to increased deliveries of non-metallic mineral manufactures (mainly precious stones) which in 1977 accounted for 29 per cent of total air exports, compared with 24 per cent in 1976. Exports by air of machinery (divisions 71-77) increased in value by £362 million to £1,683 million in 1977, including an increase of around 50 per cent for electrical machinery. The importance of machinery in total trade by air increased from 29 per cent to 31 per cent. By weight air exports of machinery increased by 21 per cent. Exports of transport equipment, in total, by air showed below average rises by both value and weight and fell as a proportion of total exports of these commodities. The proportion of live animals exported by air declined from 42 per cent to 32 per cent even though the value increased by about one-third. Goods of this kind and perishable commodities such as fruit and vegetables are often carried by air as time is critical in transporting them. Medicinal and pharmaceutical products air exports increased in value by 18 per cent, with little change in their proportion of total exports of these goods. Exceptionally, non-ferrous metal exports by air fell in value in 1977. The value of exports by air of clothing increased strongly, by 38 per cent, but the proportion of air exports to total clothing exports fell by 2 per cent. Exports by

Table 1 Value of air trade compared with total trade

	Exports fob					Imports cif				
	Total		By air			Total		By air		
Year	£ million	Change on previous year %	£ million	Change on previous year %	Air exports as proportion of total exports %	£ million	Change on previous year %	£ million	Change on previous year %	Air imports as proportion of total imports %
SITC (R)										
1960	3 794	..	230	..	6.1	4 655	..	214	..	4.6
1961	3 968	5	286	24	7.2	4 546	−2	253	18	5.6
1962	4 072	3	309	8	7.6	4 636	2	279	10	6.0
1963	4 378	8	348	13	7.9	4 989	8	312	12	6.3
1964	4 600	5	374	7	8.1	5 703	14	383	23	6.7
1965	4 933	7	457	22	9.3	5 760	1	447	17	7.8
1966	5 275	7	571	25	10.8	5 951	3	548	23	9.2
1967	5 245	0	621	9	11.8	6 440	8	645	18	10.0
1968	6 442	23	840	35	13.0	7 900	23	931	44	11.8
1969	7 351	14	991	18	13.5	8 317	5	1 085	17	13.0
1970	8 076	10	1 110	12	13.7	9 040	9	1 223	13	13.5
1971	9 186	14	1 309	18	14.2	9 825	9	1 339	9	13.6
1972	9 760	6	1 553	19	15.9	11 143	13	1 590	19	14.3
1973	12 504	28	2 161	39	17.3	15 852	42	2 378	50	15.0
1974	16 600	33	2 914	35	17.6	23 235	47	3 059	29	13.2
1975	19 921	20	3 383	16	17.0	24 128	4	3 267	7	13.7
1976	25 778	29	4 411	30	17.1	31 213	29	4 153	26	13.3
SITC (R2)										
1976	26 029	..	4 415	..	17.0	31 569	..	4 147	..	13.1
1977	33 308	27	5 693	29	17.1	36 996	17	5 280	27	14.3

See note 5 at end of article.

Table 1a Air trade by weight compared with total trade by weight

	Exports fob					Imports cif				
	Total		By air			Total		By air		
Year	'000 tonnes	Change on previous year %	'000 tonnes	Change on previous year %	Air exports as proportion of total exports %	'000 tonnes	Change on previous year %	'000 tonnes	Change on previous year %	Air imports as proportion of total imports %
SITC (R)										
1974	54 849	..	364	..	0.7	215 005	..	254	..	0.1
1975	52 016	−5	270	−26	0.5	178 834	−17	189	−26	0.1
1976	56 825	+9	271	0.4	0.5	186 567	+4	184	−3	0.1
1977	71 547	+26	314	+16	0.4	164 520	−12	190	+3	0.1

Note to table 1a: Weight data for total trade are not available before 1974, since all exports and imports have only been expressed in common weights from that date.

air of professional, scientific and controlling instruments, a group with a particularly high value to weight ratio, rose by 34 per cent in value terms.

Imports by commodity (table 3)
Imports by air in 1977 were £1,133 million (27 per cent) higher than in 1976 and the weight increased by 6000 tonnes (3 per cent). As with exports, this increase in value owed much to a rise (of £641 million) in imports of non-metallic mineral manufactures (mainly precious stones). In 1977, these items accounted for around one-third of all imports by air, compared with one-quarter in the previous year. Air imports represented 80 per cent of the total imports of these items in 1977. There was also a rise, of £232 million, in the value of imports by air of machinery to £1,619 million, with the major contribution coming from electrical machinery. By weight, imports of machinery were up by around one-tenth. Other principal changes in imports by air were an increase of about 40 per cent in the value of hides and skins and, in contrast, a fall of 46 per cent in arrivals of non-ferrous metals.

Exports by area (table 4)
On an area basis, the main increase in shipments by air in 1977 were to Latin America, up by nearly half, although from a comparatively low level, and to rest of western Europe, where a rise of almost two-fifths largely reflected trade in precious stones. In contrast, air exports to north America rose by less than one-fifth, while deliveries to EEC, the largest single market, also had a below average rise (24 per cent). By weight, exports to the oil-exporting countries rose by three-fifths and, in spite of the below average increase in value, there was a comparatively large rise, of one-third, to north America.

Exports by country (table 5)
By country, Switzerland was still the largest single market by value for deliveries by air in 1977, reflecting trade in precious stones. Air exports increased by £323 million, accounting for 70 per cent of total exports to Switzerland and 18 per cent of total exports by air. The second country in importance by value was the USA (14 per cent of total exports by air), but by weight the USA remains the most important country with a substantial rise of nearly one half compared with the previous year. Exports of precious stones to Israel and Belgium and Luxembourg explain the high percentage in value terms of deliveries by air in proportion to total exports, 44 per cent and 32 per cent, respectively. Exports by air to Japan showed an above average increase of 44 per cent, while our shipments to Nigeria, Saudi Arabia and Iran, which are our largest markets among the oil-exporting countries, increased in value in 1977 by 27 per cent, 16 per cent and 22 per cent, respectively. Deliveries by air to India increased in value by around three quarters in 1977 again largely reflecting precious stones. By weight, Nigeria was the second largest UK market with air exports 9 per cent of total air exports.

Imports by area (table 6)
In percentage terms, the main increases in the value of imports by air in 1977 came from the 'other' developed countries, from Latin America and Middle East and north Africa, with rises in excess of three-fifths, and also from rest of western Europe (44 per cent), reflecting the trade in precious stones. In contrast, shipments from EEC and north America were up by 16 per cent and 21 per cent, respectively. By weight, north America remains the largest market, with over one-third of the total; air imports from EEC fell by around one-sixth.

Imports by country (table 7)
Deliveries by air from all the countries in the EEC increased in value, with Italy showing the highest rise of 46 per cent. The marked increases in imports from Switzerland (about 50 per cent) and South Africa (around three quarters) largely reflected trade in precious

Table 2 **Commodity composition of exports by value and weight**

	Value								Weight								Fob basis
	1976				1977				1976				1977				
			Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:		
Selected divisions	Total	By air	Total exports of commodity	Total air exports	Total	By air	Total exports of commodity	Total air exports	Total	By air	Total exports of commodity	Total air exports	Total	By air	Total exports of commodity	Total air exports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
00 Live animals	62	26	42	1	109	35	32	1	55	7	13	3	96	9	9	3	
21 Hides and skins	158	43	27	1	161	44	27	1	72	1	1	0	61	1	2	0	
54 Medicinal and pharmaceutical products	452	181	40	4	555	214	39	4	83	9	11	3	87	9	10	3	
55 Essential oils and perfumes	236	10	4	0	326	13	4	0	285	2	1	1	330	2	1	1	
61 Leather manufactures, not elsewhere specified	148	51	34	1	177	62	35	1	25	3	12	1	24	3	13	1	
62 Rubber manufactures, not elsewhere specified	300	11	4	0	329	13	4	0	271	3	1	1	259	3	1	1	
65 Textile yarn, etc	972	84	9	2	1 193	108	9	2	447	13	3	5	452	14	3	4	
66 Non-metallic mineral manufactures, not elsewhere specified	1 731	1 072	62	24	2 530	1 630	64	29	2 137	6	0	2	2 950	16	1	5	
68 Non-ferrous metals	711	116	16	3	816	102	13	2	575	2	0	1	605	2	0	1	
69 Manufactures of metal, not elsewhere specified	828	54	7	1	1 044	69	7	1	865	10	1	4	956	11	1	4	
71 Power generating machinery and equipment	1 307	385	29	9	1 526	427	28	8	375	11	3	4	423	12	3	4	
72 Machinery specialised for particular industries	1 819	146	8	3	2 036	175	9	3	977	24	2	9	965	29	3	9	
73 Metal-working machinery	291	16	6	0	325	29	9	1	148	3	2	1	149	3	2	1	
74 General industrial machinery and equipment etc	1 327	119	9	3	1 641	156	10	3	550	17	3	6	618	24	4	8	
75 Office machines and ADP equipment	619	194	31	4	760	262	34	5	42	7	17	3	43	9	21	3	
76 Telecomms and Sound recording etc	627	219	35	5	712	269	38	5	81	8	10	3	76	8	11	3	
77 Electrical machinery, apparatus and appliances etc	1 003	242	24	5	1 332	365	27	6	429	15	4	6	474	18	4	6	
78 Road vehicles (including air cushion vehicles)	2 377	65	3	1	2 872	90	3	2	1 809	19	1	7	1 834	22	1	7	
79 Other transport equipment	1 012	250	25	6	1 484	269	18	5	585	8	1	3	987	6	1	2	
84 Articles of apparel and clothing accessories	412	149	36	3	599	205	34	4	47	12	26	4	55	13	24	4	
85 Footwear	68	13	19	0	102	21	21	0	15	2	13	1	18	3	17	1	
87 Professional, scientific and controlling instruments	476	247	52	6	589	332	56	6	35	9	26	3	37	10	27	3	
88 Photographic apparatus equipment etc optical goods, watches and clocks	274	91	33	2	336	113	34	2	43	6	14	2	44	5	11	2	
89 Miscellaneous manufactures not elsewhere specified	945	299	32	7	1 202	357	30	6	364	34	9	13	413	36	9	11	
All other goods	7 869	332	4	8	10 552	333	3	6	46 510	40	0	15	59 591	46	0	15	
Total	26 024	4 415	17.0	100	33 308	5 693	17.1	100	56 825	271	0.5	100	71 547	314	0.4	100	

Table 3 Commodity composition of imports by value and weight

Selected divisions	Value								Weight								Cif basis
	1976				1977				1976				1977				
			Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:		
	Total	By air	Total imports of commodity	Total air imports	Total	By air	Total imports of commodity	Total air imports	Total	By air	Total imports of commodity	Total air imports	Total	By air	Total imports of commodity	Total air imports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
00 Live animals	84	10	12	0	99	10	10	0	149	1	1	1	152	1	1	1	
05 Fruit and vegetables	942	17	2	0	1 107	19	2	0	3 931	32	1	17	3 799	31	1	17	
21 Hides and skins	172	62	36	2	210	88	42	2	69	1	1	1	76	2	2	1	
28 Metalliferous ores and scrap	716	93	13	2	749	77	10	1	21 705	1	0	1	18 339	1	0	1	
54 Medicinal and pharmaceutical products	139	63	46	2	174	63	36	1	12	2	17	1	13	1	8	1	
55 Essential oils and perfumes	97	17	18	0	126	15	12	0	52	1	2	1	58	1	2	1	
61 Leather and leather manufactures, not elsewhere specified	108	20	19	0	134	25	19	0	41	2	5	1	41	2	5	1	
62 Rubber manufactures not elsewhere specified	131	9	7	0	202	12	6	0	106	1	1	1	186	1	1	1	
65 Textile yarn etc	920	75	8	2	1 130	81	7	2	475	10	2	5	492	8	2	4	
66 Non-metallic mineral manufactures, not elsewhere specified	1 361	1,052	77	25	2 121	1 693	80	32	656	2	0	1	729	2	0	1	
68 Non-ferrous metals	1 027	104	10	3	1 131	71	6	1	1 316	3	0	1	1 270	2	0	1	
69 Manufactures of metal, not elsewhere specified	444	54	12	1	533	69	13	1	268	5	2	3	299	6	2	3	
71 Power generating machinery and equipment	572	269	47	7	695	331	48	6	119	6	5	3	136	7	5	4	
72 Machinery specialised for particular industries	742	73	10	2	881	82	9	2	318	7	2	4	338	7	2	4	
73 Metalworking machinery	216	14	6	0	223	20	9	0	83	1	1	1	59	1	2	1	
74 General industrial machinery and equipment etc	803	127	16	3	991	154	16	3	289	10	4	5	295	11	4	6	
75 Office machines and ADP equipment	750	439	59	11	912	489	54	9	32	11	34	6	36	12	34	6	
76 Telecommunications and sound recording etc	443	136	31	3	544	123	23	2	52	4	7	2	60	3	5	2	
77 Electrical machinery, apparatus and appliances etc	779	329	42	8	1 050	420	40	8	205	11	5	6	256	14	5	7	
78 Road vehicles (including air cushion vehicles)	1 432	18	1	0	2 134	20	1	0	870	4	0	2	1 096	4	0	2	
79 Other transport equipment	1 019	107	11	3	1 355	123	9	2	382	3	1	2	289	4	1	2	
84 Articles of apparel and clothing accessories	684	140	20	3	767	157	20	3	108	14	13	8	105	12	12	7	
85 Footwear	166	17	10	0	214	23	11	0	58	2	3	1	62	2	4	1	
87 Professional, scientific and controlling instruments	353	242	69	6	418	282	67	5	17	5	29	3	19	5	28	3	
88 Photographic apparatus equipment etc, optical goods, watches and clocks	329	154	47	4	421	193	46	4	38	5	12	3	43	5	12	3	
89 Miscellaneous manufactures, not elsewhere specified	750	236	31	6	972	336	35	6	291	13	5	7	322	16	5	9	
All other goods	16 390	270	2	6	17 703	304	2	6	154 925	27	0	14	135 950	29	0	13	
Total	31 569	4 147	13.1	100	36 996	5 280	14.3	100	186 567	184	0.1	100	164 520	190	0.1	100	

Table 4 Exports to various areas by value and weight

	Value								Weight								Fob basis
	1976				1977				1976				1977				
			Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:		
	Total	By air	Total exports to area	Total air exports	Total	By air	Total exports to area	Total air exports	Total	By air	Total exports to area	Total air exports	Total	By air	Total exports to area	Total air exports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
EEC	9 249	1 317	14	30	12 152	1 631	13	29	31 500	70	0.2	26	39 005	73	0.2	23	
Rest of western Europe	4 298	947	22	21	5 606	1 310	23	23	10 865	26	0.2	10	12 721	26	0.2	8	
North America	3 119	774	25	18	3 821	921	24	16	4 013	45	1.1	17	7 465	60	0.8	19	
Other developed countries	1 949	267	14	6	2 110	338	16	6	1 814	17	0.9	6	1 508	16	1.1	5	
Latin America	759	74	10	2	984	109	11	2	899	5	0.6	2	1 196	7	0.6	2	
Middle East and north Africa	2 983	561	19	13	3 869	737	19	13	2 678	53	2.0	20	3 138	65	2.1	21	
Other developing countries	2 885	437	15	10	3 782	600	16	11	4 151	52	1.3	19	5 753	65	1.1	21	
Centrally planned economies	726	39	5	1	911	47	5	1	905	2	0.2	1	761	3	0.4	1	
Low value trade	56	–	–	–	96		–	–	–	–	–	–	–	–	–	–	
World of which	26 024	4 415	17.0	100	33 308	5 693	17.1	100	56 825	271	0.5	100	71 547	314	0.4	100	
Oil-exporting countries	3 221	532	16.5	12.1	4 368	715	16.3	12.6	3 560	51	1.4	19	5 187	82	1.6	26	

stones. Imports by air from the USA, which is still the UK's largest source, accounted for 26 per cent of the value of all imports by air and one-third of the weight. One other interesting feature was the sharp fall in imports by air from India in 1977, the result of lower arrivals of non-ferrous metals.

Notes

1 The valuation of exports and imports in this article is on an Overseas Trade Statistics basis. While estimates for total trade are published on a balance of payments basis in the monthly trade article, the adjustments to that basis are not available for the analysis of trade by air.

2 Complete newly built aircraft and ships exported and imported under their own power are included in the value totals for all United Kingdom trade but are excluded from the figures of trade by air and from the weight statistics.

3 Imports and exports of parcel-post and low-

Table 5 Exports to selected countries by value and weight

	Value								Weight								Fob basis
	1976				1977				1976				1977				
			Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:				Air exports as a proportion of:		
Selected countries	Total	By air	Total exports to country	Total air exports	Total	By air	Total exports to country	Total air exports	Total	By air	Total exports to country	Total air exports	Total	By air	Total exports to country	Total air exports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
EEC																	
Belgium and Luxembourg	1 406	433	31	10	1 843	588	32	10	4 277	7	0.2	3	4 418	7	0.2	2	
Denmark	656	34	5	1	804	45	6	1	3 218	2	0.1	1	3 923	2	0.1	1	
France	1 732	245	14	6	2 166	283	13	5	4 754	14	0.3	5	6 440	15	0.2	5	
Irish Republic	1 264	90	7	2	1 648	107	7	2	6 084	14	0.2	5	5 786	14	0.2	4	
Italy	830	116	14	3	987	142	14	3	2 091	8	0.4	3	1 604	9	0.6	3	
Netherlands	1 517	110	7	2	2 178	138	6	2	6 527	10	0.2	4	9 551	10	0.1	3	
West Germany	1 843	289	16	7	2 526	327	13	6	4 548	14	0.3	5	7 283	16	0.0	5	
Rest of western Europe																	
Austria	213	22	10	1	254	26	10	0									
Portugal	225	20	9	0	301	19	6	0	483	2	0.4	1	547	2	0.4	1	
Spain	369	51	14	1	471	56	12	1	1 087	3	0.3	1	1 399	3	0.2	1	
Sweden	1 052	67	6	2	1 201	70	6	1	5 109	4	0.1	1	6 080	4	0.1	1	
Switzerland	1 004	677	67	15	1 435	1,000	70	18									
Austria and Switzerland									461	6	1.3	2	574	5	0.9	2	
North America																	
USA	2 465	646	26	15	3 095	778	25	14	3 384	34	1.0	13	6 792	50	0.7	16	
Canada	630	124	20	3	702	139	20	2	568	11	1.9	4	615	10	1.6	3	
Other developed countries																	
Australia	692	77	11	2	763	96	13	2	653	5	0.8	2	553	5	0.9	2	
Japan	360	103	29	2	471	148	31	3	239	5	2.1	2	223	4	1.8	1	
South Africa	646	70	11	2	586	77	13	1	624	5	0.8	2	479	5	1.0	2	
Latin America																	
Brazil	174	26	15	1	256	31	12	1	210	2	1.0	1	199	2	1.0	1	
Middle east and North Africa																	
Iran	513	55	11	1	659	67	10	1	450	5	1.1	2	490	7	1.4	2	
Isreal	249	103	41	2	276	122	44	2	161	1	0.6	0	145	2	1.4	1	
Saudi Arabia	409	97	24	2	601	113	19	2	311	7	2.3	2	453	8	1.8	3	
Other developing countries																	
Hong Kong	206	42	20	1	271	61	22	1	170	2	1.2	1	195	2	1.0	1	
India	207	61	29	1	278	106	38	2	270	2	0.7	1	242	2	0.8	1	
Nigeria	775	133	17	3	1 079	169	16	3	1 285	23	1.8	8	1 935	28	1.4	9	
Sierre Leone	18	1	6	0	20	2	8	0	105	0	0.0	0	94	0	0.0	0	
Singapore	171	30	18	1	201	31	16	1	306	2	0.7	1	280	2	0.1	1	
Centrally planned economies																	
Soviet Union	240	4	2	0	348	5	1	0	264	0	0.0	0	235	0	0.0	0	
Total selected countries	19 866	3 726	19	84	25 420	4 746	19	83	47 639	188	0.4	69	60 535	214	0.4	68	
All other countries	6 102	689	11	16	7 792	947	12	17	9 186	83	0.9	31	11 012	100	0.9	32	
Low value trade	56	–	–	–	96	–	–	–	–	–	–	–	–	–	–	–	
World	26 024	4 415	17.0	100	33 308	5 693	17.1	100	56 825	271	0.5	100	71 547	314	0.4	100	

NOTE Austria and Switzerland exports by weight are not available separately.

Table 6 Imports from various areas by value and weight

	Value								Weight								Cif basis
	1976				1977				1976				1977				
			Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:		
	Total	By air	Total imports from area	Total air imports	Total	By air	Total imports from area	Total air imports	Total	By air	Total imports from area	Total air imports	Total	By air	Total imports from area	Total air imports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
EEC	11 510	1 070	9	26	14 171	1 245	9	24	38 599	52	0.1	28	38 601	44	0.1	23	
Rest of western Europe	4 645	723	16	17	5 576	1 043	19	20	23 571	13	0.1	7	20 795	13	0.1	7	
North America	4 280	1 231	29	30	4 948	1 491	30	28	15 034	58	0.4	32	15 505	67	0.4	35	
Other developed countries	2 134	385	18	9	2 698	627	23	12	6 860	7	0.1	4	6 942	8	0.1	4	
Latin America	708	34	5	1	768	57	7	1	8 111	3	0.0	2	6 008	4	0.1	2	
Middle east and north America	4 188	101	2	2	3 938	162	4	3	73 478	17	0.0	9	58 668	21	0.0	11	
Other developing countries	2 963	388	13	9	3 457	387	11	7	12 455	33	0.3	18	9 463	32	0.3	17	
Centrally planned economies	1 109	216	19	5	1 371	269	20	5	8 458	1	0.0	1	8 539	1	0.0	1	
Low-value trade	31	–	–	–	53	–	–	–	–	–	–	–	–	–	–	–	
World of which	31 569	4 147	13.1	100	36 996	5 280	14.3	100	186 567	184	0.1	100	164 520	190	0.1	100	
Oil-exporting countries	4 296	77	2	2	3 804	126	3	2	78 493	3	0.0	2	58 903	3	0.0	2	

Table 7 **Imports from selected countries by value and weight**

	Value								Weight								Cif basis
	1976				1977				1976				1977				
			Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:				Air imports as a proportion of:		
	Total	By air	Total imports from country	Total air imports	Total	By air	Total imports from country	Total air imports	Total	By air	Total imports from country	Total air imports	Total	By air	Total imports from country	Total air imports	
	£m	£m	%	%	£m	£m	%	%	'000 tonnes	'000 tonnes	%	%	'000 tonnes	'000 tonnes	%	%	
EEC																	
Belgium and Luxembourg	1 303	191	15	5	1 685	241	14	5	4 939	7	0.1	4	6 407	5	0.1	3	
Denmark	708	26	4	1	816	31	4	1	1 359	1	0.1	1	1 452	1	0.1	1	
France	2 112	282	13	7	2 694	302	11	6	5 644	10	0.2	6	6 321	10	0.2	5	
Irish Republic	1 052	63	6	2	1 299	66	5	1	3 563	8	0.2	4	3 690	4	0.1	2	
Italy	1 110	91	8	2	1 544	133	9	3	3 212	6	0.2	3	3 692	6	0.2	3	
Netherlands	2 456	93	4	2	2 524	120	5	2	15 774	6	0.0	3	12 405	4	0.0	2	
West Germany	2 770	325	12	8	3 608	351	10	7	4 108	14	0.3	8	4 634	13	0.3	7	
Rest of western Europe																	
Austria	233	16	7	0	270	17	6	0									
Portugal	230	28	12	1	233	30	13	1	577	2	0.4	1	611	2	0.3	1	
Spain	361	19	5	0	438	22	5	0	1 765	3	0.2	2	1 626	3	0.2	2	
Sweden	1 194	36	3	1	1 268	38	3	1	7 100	2	0.0	1	6 835	2	0.0	1	
Switzerland	967	580	60	14	1 333	881	66	17									
Austria and Switzerland									507	4	0.8	2	517	4	0.8	2	
North America																	
USA	3 100	1 124	36	27	3 695	1 378	37	26	6 164	54	0.9	29	7 423	63	0.9	33	
Canada	1 165	101	9	2	1 214	104	9	2	8 869	4	0.1	2	8 082	3	0.0	2	
Other developed countries																	
Australia	393	18	5	0	365	20	5	0	4 001	1	0.0	1	2 870	1	0.0	1	
Japan	797	77	10	2	1 064	99	9	2	560	4	0.7	2	597	4	0.7	2	
South Africa	615	286	46	7	877	504	57	10	1 768	1	0.1	1	2 960	2	0.1	1	
Latin America																	
Brazil	242	11	4	0	305	13	4	0	3 853	1	0.0	1	3 562	1	0.0	1	
Middle East and north Africa																	
Iran	1 048	8	1	0	789	13	2	0	19 982	0	0.0	0	12 984	0	0.0	0	
Israel	129	16	13	0	163	25	15	0	555	4	0.7	2	664	5	0.8	2	
Saudi Arabia	986	25	3	1	1 132	47	4	1	18 596	0	0.0	0	18 517	0	0.0	0	
Other developing countries																	
Hong Kong	440	57	13	1	457	65	14	1	137	4	2.9	2	128	4	3.1	2	
India	355	125	35	3	387	77	20	1	589	10	1.7	6	422	8	1,9	5	
Nigeria	323	8	2	0	238	10	4	0	4 107	1	0.0	1	1 506	1	0.1	1	
Sierra Leone	36	30	84	1	40	29	73	1	50	0	0.0	0	40	0	0.0	0	
Singapore	94	19	20	1	103	21	20	0	672	1	0.2	1	666	1	0.2	1	
Centrally planned economies																	
Soviet Union	645	202	31	5	788	252	32	5	6 162	0	0.0	0	6 252	0	0.0	0	
Total selected countries	24 864	3 857	16	93	29 329	4 889	17	93	124 612	149	0.1	81	114 863	148	0.1	78	
All other countries	6 674	290	4	7	7 614	391	5	7	61 955	35	0.1	19	49 657	41	0.1	22	
Low value trade	31	—	—	—	53	—	—	—	—	—	—	—	—	—	—	—	
World	31 569	4 147	13.1	100	36 996	5 280	14.3	100	186 567	184	0.1	100	164 520	190	0.1	100	

NOTE Austria and Switzerland imports by weight are not available separately

value items not classified according to kind are excluded from the trade by air and the weight statistics.

4 No allowance is made either in the totals of trade or in the figures of trade by air for under-recording of exports.

5 Figures of the value of UK trade by air are available on the existing trade classification, SITC (Revision 2), only from 1976. Figures of the weight of UK trade by air from 1976 for the specific commodities shown in the tables are also given on the SITC (Revision 2) basis, but the totals for these years are on SITC (R). Prior to 1976, all value and weight figures of trade by air are on SITC (R). For consistency, the figures of UK's total trade before 1976 in table 1 are also given on the SITC (R) basis, rather than according to the currently published SITC (Revision 2).

6 The percentages in the tables are based on rounded data.

Further data on trade by air may be obtained from the Controller, Statistical Office, HM Customs and Excise, Portcullis House, 27 Victoria Avenue, Southend-on-Sea, SS2 6AL, on payment of a fee to cover the cost of preparing the information.

Symbols

. . Figures not available.

0 Less than half the unit shown.

Inquiries: 01-215 3155.

Footwear industry orders, deliveries and stocks in May: amended figures

Footwear industry figures for 1978 (see *Trade and Industry*, 18 August, page 404), excluding the index of output, have been amended.

In the three months ended May 1978, deliveries in the footwear industry were estimated to be 1 per cent lower on a seasonally adjusted pairage basis than in the three months ended February 1978. Net new orders were 25 per cent lower than in the previous three months, while at the end of May orders-on-hand were 20 per cent higher on the February 1978 level. The index of output in the three months ended May 1978 was 1 per cent higher than in the three months ended February 1978.

The table shows amended figures.

Inquiries: 01-212 6787.

Index of output: orders on hand, net new orders, deliveries and stocks of complete footwear

Monthly averages or monthly totals

	Index of output 1970 = 100	Orders-on-hand (end period)		Net new orders			Deliveries			Stocks (end period)
		Million pairs	£m	Million pairs		£m	Million pairs		£m	Million pairs
	Seasonally adjusted	Actual	Actual	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual
1978 1st quarter p	93	59.8	153.7	17.8	16.3	56.5	12.8	12.5	52.7	17.2
1978 January p	95	53.7	137.8	20.7	21.8	43.4	11.9	12.6	47.9	
February p	97	54.8	139.4	13.8	12.7	54.1	12.7	12.4	52.5	
March p	101	59.8	153.7	18.9	14.4	71.9	13.9	12.4	57.7	
April p	107	55.6	162.4	7.6	7.4	56.7	11.9	14.0	47.9	
May p	96	65.5	182.9	21.6	17.9	68.8	11.7	11.9[1]	48.3	

p Provisional.

[1] Based on early returns, seasonally adjusted deliveries in June are expected to be 13½ million pairs.

Engineering sales and orders up to May

Sic orders VII, VIII and IX

Provisional trend estimates and seasonally adjusted volume indices of engineering sales and orders up to May show a continuing improvement in sales to both home and export markets. The trend of new orders also rose slightly over the three months to May, although this is unsupported by the seasonally adjusted data. Home order books were unchanged while those for export shortened slightly.

The general uncertainty of the seasonally adjusted, untrended data for new orders – particularly the high degree of volatility in the export market – renders the trend estimate less reliable and interpretation more difficult. The addition of the latest month's information reversed the previous downward trend in both markets and produced a rise of 1½ per cent in the trend estimate between February and May for both home and export series. Taking a longer-term view, new home orders have been improving slowly since the middle of last year, and are expected to maintain this growth over the next few months. Owing to the volatility referred to above, it is unclear whether last year's decline in new export orders, reflecting some loss of competitiveness, has been halted.

Home sales rose by 3 per cent during the three months to May. This increase, which began in the fourth quarter of 1977, comes after a period of two years during which domestic sales fluctuated only slightly in a narrow range. In contrast, the volume of export deliveries grew from mid-1976 until a set-back towards the end of 1977; they have recently resumed their rise, increasing by 1½ per cent between February and May.

Home orders-on-hand showed little change over the three months to the end of May, as the intake of new contracts was just sufficient to balance the level of sales. Export sales, however, exceeded new orders, as the seasonally adjusted figures show, producing a slight shortening of the order book.

The revised figures published in this table are based on the monthly engineering inquiry relating to May 1978. The response rate of 80 per cent to the inquiry for May is judged sufficient to justify publication of provisional indices for this month. Taking into account late returns now received for February, March and April response rates for these months were 94, 90 and 87 per cent respectively.

An expanded commentary, together with additional tables, is given in Business Monitor PM 33–36, Engineering (volume indices of sales and orders), obtainable from HMSO, PO Box 569, London SE1 9NH, post free for a subscription of £4.32 per annum. Separate commentaries and volume indices are given for sales, orders-on-hand and net new orders for total, home and export markets, for mech-

Volume index numbers for the combined engineering industries up to May

	Total			Home			Export		
	1970 average = 100	1970 average monthly sales = 100		1970 average = 100	1970 average monthly sales = 100		1970 average = 100	1970 average monthly sales = 100	
	Orders-on-hand (end of period)	New orders	Sales	Orders-on-hand (end of period)	New orders	Sales	Orders-on-hand (end of period)	New orders	Sales
Ratio: orders-on-hand/av. monthly sales in 1970 [1]	6.7			6.3			7.6		
Trend estimates									
1976 p									
January	96	92	105	89	87	99	111	105	121
February	94	93	105	87	88	99	109	107	122
March	92	94	105	86	89	99	107	109	122
April	91	95	105	84	90	99	106	111	122
May	90	97	106	83	91	100	105	114	121
June	89	100	105	81	92	100	105	120	120
July	88	103	105	80	93	100	106	128	120
August	88	105	105	80	94	99	108	135	120
September	89	107	105	79	95	99	110	139	121
October	89	108	106	78	96	100	113	141	122
November	89	109	106	78	98	100	115	139	123
December	90	109	107	78	99	101	117	137	124
1977 p									
January	90	109	107	78	99	101	118	135	124
February	90	108	107	77	99	100	119	134	124
March	90	107	107	77	98	100	120	132	125
April	90	107	106	77	97	99	121	131	126
May	90	106	106	76	96	98	122	132	128
June	90	105	106	76	96	97	122	131	130
July	90	105	106	76	96	97	121	129	131
August	90	105	106	76	96	97	121	127	131
September	90	105	105	76	97	96	120	125	129
October	90	106	105	76	99	97	120	125	127
November	90	107	105	77	100	97	120	125	126
December	90	108	106	77	101	99	120	125	126
1978 p									
January	90	109	107	77	102	100	120	126	126
February	91	109	109	78	103	102	120	126	127
March	91	110	110	78	103	103	120	127	128
April	91	110	110	78	104	104	119	127	128
May	91	111	111	78	105	104	119	129	129
Percentage change [2] Feb-May 1978	–	+1.5	+2.5	–	+1.5	+3.0	−0.5	+1.5	+1.5
Seasonally adjusted									
1970	99	100	100	99	100	100	99	101	100
1971	90	94	99	92	96	99	84	90	100
1972	96	104	100	100	107	103	89	96	92
1973	127	129	111	127	129	114	128	128	103
1974	128	115	115	122	110	113	142	128	119
1975	97	93	110	90	89	106	112	103	121
1976 p	90	101	105	77	92	99	117	124	121
1977 p	91	107	106	77	98	98	121	129	127
1976 p									
1st qtr	93	94	104	86	89	98	108	110	122
2nd	88	96	106	81	91	101	103	107	121
3rd	88	106	105	79	95	100	109	135	120
4th	90	109	105	77	95	99	117	144	122
1977 p									
1st qtr	90	109	108	77	101	101	120	131	124
2nd	90	106	106	76	95	98	122	133	129
3rd	90	106	106	76	97	97	121	129	132
4th	91	107	104	77	100	97	121	125	123
1978 p									
1st qtr	90	109	110	77	103	103	119	126	130
1976 p									
July	89	109	104	80	92	98	107	154	119
August	89	105	106	80	95	100	109	132	120
September	88	103	106	79	97	101	109	118	121
October	89	113	107	78	97	101	113	157	124
November	90	112	104	78	97	98	117	150	123
December	90	101	104	77	92	98	117	125	120
1977 p									
January	90	112	111	77	104	104	118	131	129
February	90	111	108	78	103	102	119	133	123
March	90	104	104	77	94	98	120	129	120
April	90	110	108	77	98	100	121	140	129
May	91	107	104	77	96	96	123	137	126
June	90	100	107	76	91	98	122	123	131
July	89	105	108	76	99	99	120	119	133
August	90	109	105	76	98	96	121	140	129
September	90	103	107	76	94	97	121	127	133
October	90	107	106	76	99	97	121	128	129
November	90	100	101	77	98	94	119	107	121
December	91	113	105	77	102	99	121	139	120
1978 p									
January p	90	106	110	78	105	102	118	107	131
February	92	119	108	78	105	101	122	159	127
March	90	103	113	77	100	105	119	112	133
April	90	104	107	77	100	101	118	116	122
May	91	117	112	78	110	105	119	138	129
Dec 1977-Feb 1978 (av)	92	113	108	78	104	101	122	135	126
Mar-May 1978 (av.)	91	108	111	78	103	103	119	122	128
Percentage change [2]	−1.0	−4.0	+2.5	−0.5	−1.0	+3.0	−2.0	−10.0	+1.5

Notes to table

[1] This ratio shows the number of months work in the order book in the base year at the then average rate of sales. [2] For orders-on-hand, the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period. The percentage changes have been based on the unrounded values and are given to the nearest half percentage point. p Provisional.

anical, instrument and electrical engineering (SIC orders VII, VIII and IX respectively).

The same nine series are given for each of the 36 industries within engineering in a quarterly Business Monitor PQ 33–36, Engineering (volume indices of sales and orders), also obtainable from HMSO for a subscription of £1.56 per annum.

Inquiries: Department of Industry, Room 618, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 5770.

Business Monitors

The following titles and issues of Business Monitors are now available.

PRODUCTION SERIES

Quarterly at £1.56 each per year post free:

PQ 229.1	Margarine for first quarter 1978
PQ 275	Soap and detergents for first quarter 1978
PQ 276.1	Synthetic resins and plastic material for first quarter 1978
PQ 323	Miscellaneous non-ferrous metals for first quarter 1978
PQ 335	Textile machinery and accessories for first quarter 1978
PQ 353	Surgical instruments and appliances for first quarter 1978
PQ 354	Scientific and industrial instruments and systems for first quarter 1978
PQ 365.1	Gramophone records and tape recordings for first quarter 1978
PQ 365.2	Broadcast receiving and sound reproducing equipment for first quarter 1978
PQ 366	Electronic computers for first quarter 1978
PQ 380	Wheeled tractors for first quarter 1978
PQ 394	Wire and wire manufactures for first quarter 1978
PQ 461.2	Clay building bricks and other non-refractory goods for first quarter 1978
PQ 469.2	Miscellaneous building materials and mineral products for first quarter 1978
PQ 489	General printing and publishing for first quarter 1978
PQ 494.1	Toys, games and children's carriages for first quarter 1978

Monthly at £4.32 each per year post free:

PM 332	Metal-working machine tools for April 1978
PM 33-36	Engineering (volume indices of sales and orders) for April 1978
PM 381	Cars and commercial vehicle production for June 1978
PM 481	Paper and paper making materials for May 1978

MISCELLANEOUS SERIES

Quarterly at £1.56 each per year post free:

M 7	Acquisitions and mergers of industrial and commercial companies for second quarter 1978
M 12	Import penetration and export sales ratios for manufacturing industry for March 1978

SERVICE AND DISTRIBUTIVE SERIES

Monthly at £4.32 each per year post free:

SD 1	Food shops for June 1978
SD 2	Clothing and footwear for June 1978
SD 3	Durable goods shops for June 1978
SD 4	Miscellaneous non-food shops for June 1978
SD 6	Instalment credit business of finance houses for June 1978
SD 8	Instalment credit business of retailers for June 1978

Censuses of Production 1974 and 1975

Publication of the Business Monitor reporting the results of the censuses of production 1974 and 1975. The following table lists the Business Monitors which have been published to date. Earlier lists for this series published in *Trade and Industry* should be disregarded.

1974 and 1975 Report on the Censuses of Production (price including postage shown in brackets)

PA 1001	Introductory notes (£1.37)
PA 322	Copper, brass and other copper alloys (£0.92)
PA 323	Miscellaneous base metals (£0.92)
PA 342	Ordnance and small arms (£0.92)
PA 362	Insulated wires and cables (£0.92)
PA 366	Electronic computers (£0.92)
PA 382	Motor cycle, tricycle and pedal cycle manufacturing (£0.92)
PA 393	Bolts, nuts, screws, rivets etc. (£0.92)
PA 394	Wire and wire manufactures (£0.92)
PA 395	Cans and metal boxes (£0.92)
PA 380	Wheeled tractor manufacturing (£0.92)
PA 399.5	Drop forgings etc. (£0.92)
PA 429.1	Asbestos (£0.92)
PA 431	Leather (tanning and dressing) and fellmongery (£0.92)
PA 442	Men's and boys' tailored outerwear (£0.92)
PA 449.2	Gloves (£0.92)
PA 473	Bedding etc. (£0.92)
PA 481	Paper and board (£0.92)
PA 483	Manufactured stationery (£0.92)
PA 484.2	Miscellaneous manufactures of paper and board (£0.92)

Index of industrial production for June

Figures for June suggest that industrial output continued to increase in recent months. (Estimates for some months have been affected by changes in the incidence of holidays.)

Before any adjustment (apart from regular seasonal factors), the provisional estimates show that the average levels of the all-industries' index and the corresponding index for manufacturing industries in the second quarter of 1978 were about 1 per cent above their levels in the preceding quarter. An analysis by broad market sector suggests that, over the same period, the output of the consumer goods industries rose by ½ per cent, the output of the investment goods industries fell by ½ per cent, and the output of the intermediate goods industries rose by 2 per cent.

On longer-term comparisons, the all-industries' index in the second quarter of 1978 was about 5½ per cent above the trough in the third quarter of 1975; the comparison for manufacturing industries shows a corresponding rise of about 4½ per cent. The all-industries' index in the latest three months was about 2 per cent above its level in the same period a year ago; a similar comparison for manufacturing industries shows a rise of about 1½ per cent.

The index numbers in the tables are all seasonally adjusted. The seasonal adjustment process is designed to remove annually recurring month-to-month variations due, for example, to the incidence of holidays and other regular seasonal patterns of behaviour. The adjustments, however, can in general only be derived from analysis of past experience and may not be completely appropriate when holiday patterns change sharply. Changes in recent years in the amount and incidence of industrial holidays taken between Christmas and new year's day and around the spring bank holiday may not be fully reflected in the seasonally adjusted estimates.

The provisional estimates for May and June in recent years are particularly vulnerable to distortions because of holiday effects. The spring bank holiday was taken on 6 June in 1977 in England and Wales and an extra public holiday was taken throughout the United Kingdom on 7 June 1977. In 1978, the spring bank holiday reverted to May and a new public holiday was introduced on 1 May. The current assessment of the underlying level of industrial production makes broad allowance for these effects.

Inquiries: 01-233 7239.

Index of industrial production: summary table

Seasonally adjusted — 1970 = 100

				Manufacturing industries								
	Total all industries	All industries other than construction	Mining and quarrying	Total manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering and allied industries	Textiles, leather and clothing	Other manufacturing	Construction	Gas, electricity and water
Weights	1 000	850	37	745	84	65	57	319	76	144	146	72
1971	100.1	99.8	100.0	99.4	100.7	102.3	91.3	98.7	102.2	100.8	101.8	103.8
1972	102.3	102.1	84.1	102.0	105.0	107.5	91.4	99.2	104.5	107.1	103.5	111.3
1973	110.0	110.5	92.6	110.5	109.3	119.5	100.0	107.2	110.2	118.9	107.9	118.1
1974	106.3	108.5	79.2	108.9	109.9	124.6	91.7	108.3	103.1	112.1	93.8	118.5
1975	100.6	103.1	85.9	102.2	108.8	113.3	78.6	103.1	99.7	102.2	86.1	120.3
1976	101.4	104.3	88.7	103.2	110.9	124.3	85.3	98.9	101.9	106.3	84.5	123.1
1977	102.7	106.1	103.6	104.0	112.4	127.9	80.6	99.9	101.4	107.9	83.2	128.1
1977												
1st qtr	103.4	107.3	102.4	105.5	112.9	129.0	83.9	100.9	104.7	109.5	80.8	127.5
2nd	102.1	105.6	104.0	103.2	111.3	128.5	80.5	99.2	100.2	106.2	81.7	131.1
3rd	103.0	106.2	104.7	104.0	111.1	128.0	83.3	100.1	100.7	107.8	84.3	128.8
4th	102.4	105.3	103.5	103.4	114.5	126.0	74.8	99.4	100.0	108.3	86.1	124.9
1978												
1st qtr	103.5	106.6	108.3	103.8	113.1	126.8	76.8	101.2	99.7	106.6	85.7	133.2
2nd qtr	104.3	107.6	111.6	104.8	112.8	130.2	83.1	101.2	100.5	107.2		133.6
1977												
Jun	100.4	103.7	105	100.8	109	127	75	97	98	104		132
Jul	103.1	106.4	104	104.6	112	127	87	101	102	107		125
Aug	103.0	106.3	105	103.8	110	130	79	100	99	109		132
Sep	102.8	106.0	106	103.7	111	127	85	100	101	107		129
Oct	102.1	104.9	103	103.1	113	126	75	99	101	108		124
Nov	102.0	104.8	103	102.7	115	127	70	99	98	108		127
Dec	103.1	106.1	104	104.4	115	125	79	101	101	109		124
1978												
Jan	103.2	106.2	108	103.5	113	125	75	101	99	106		133
Feb	103.7	106.9	110	103.7	113	126	78	101	100	107		137
Mar	103.5	106.7	107	104.4	113	130	78	102	100	107		129
Apr	105.4	108.9	111	105.8	113	128	85	102	105	108		138
May	103.3	106.4	111	103.6	111	129	83	101	98	105		132
June	104.2	107.5	112	105.0	115	134	80	101	98	108		130
Percentage change latest three months on:												
1. previous three months	0.8	0.9	3.0	0.9	−0.3	2.6	8.1	0.0	0.7	0.6		0.3
2. a year earlier	2.2	1.8	7.3	1.6	1.4	1.3	3.2	2.0	0.3	0.9		1.9

p Provisional.

Index of industrial production: detailed analysis

Seasonally adjusted — 1970 = 100

	Mining and quarrying		Food, drink and tobacco		Chemicals, coal and petroleum products		Metal manufacture		Engineering and allied industries				
	Coal mining	Other mining and quarrying	Food	Drink and tobacco	Coal and petroleum products	Chemicals and allied industries	Ferrous	Non-ferrous	Total engineering	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering
Weights	30	7	52	32	7	58	43	14	182	100	15	67	16
1971	98.4	106.5	99.9	101.9	103.3	102.1	89.8	95.8	99.4	97.4	103.3	101.6	98.7
1972	76.4	116.3	104.0	106.5	102.5	108.1	89.4	97.3	99.1	93.6	101.9	106.6	89.5
1973	84.2	127.1	106.3	114.2	110.0	120.7	97.3	108.5	109.7	101.8	110.1	121.3	90.6
1974	70.0	117.1	104.5	118.8	106.0	126.9	87.7	104.2	113.1	106.2	117.8	122.6	92.4
1975	81.1	105.8	101.4	121.1	92.0	116.0	74.2	92.3	108.7	104.2	118.5	113.4	97.7
1976	74.7	146.4	103.7	122.7	96.5	127.8	82.0	95.5	103.7	97.5	113.3	110.8	92.0
1977	72.8	231.2	106.4	122.3	93.2	132.2	76.7	92.8	104.0	95.4	115.5	114.3	86.8
1977													
1st qtr	74.1	219.4	107.1	122.5	95.9	133.2	79.4	97.7	106.2	99.2	113.7	115.2	83.5
2nd	73.5	230.0	104.8	121.9	94.3	132.8	76.5	92.8	102.4	94.6	115.9	111.2	90.7
3rd	72.3	238.9	106.4	118.6	92.6	132.5	81.0	90.4	104.2	94.7	115.7	115.9	88.6
4th	71.2	236.6	107.3	126.4	90.2	130.5	69.9	90.1	103.2	93.2	116.9	115.1	84.4
1978													
1st qtr	73.5	252.3	105.8	125.1	91.0	131.3	72.7	89.7	105.5	95.0	117.7	118.6	87.8
2nd	72.1	274.8	104.8	125.9	88.9	135.4	80.2	92.2	106.9	94.4	123.3	122.1	84.2
1977													
Jun	73	235	102	121	95	131	71	90	102	94	116	112	90
Jul	73	231	106	122	94	131	85	91	104	95	116	115	81
Aug	72	242	106	116	92	135	75	88	104	95	116	116	95
Sep	72	244	107	118	92	131	82	92	104	94	116	116	90
Oct	72	234	106	126	88	130	70	91	103	93	116	115	79
Nov	71	235	109	125	87	132	65	88	103	93	117	115	91
Dec	71	240	108	128	95	129	75	91	103	94	118	115	83
1978													
Jan	73	251	107	123	89	130	70	90	105	95	116	117	85
Feb	74	260	105	127	88	130	75	88	106	95	118	119	89
Mar	74	246	105	125	96	134	73	91	106	95	119	120	89
Apr	73	269	103	128	91	132	81	98	107	95	122	121	78
May	71	278	104	122	92	134	81	90	107	94	123	122	85
Jun	72	278	107	128	84	140	78	89	107	94	125	124	89
Percentage change latest three months on:													
1. previous three months	−1.9	8.9	−0.9	0.6	−2.3	3.1	10.3	2.7	1.4	−0.6	4.8	3.0	−4.1
2 a year earlier	−1.9	19.5	0.0	3.3	−5.7	1.9	4.7	−0.7	4.4	−0.2	6.4	9.8	−7.2

	Engineering and allied industries (cont)				Textiles, leather and clothing			Other manufacturing					
	Total vehicles	Motor vehicles	Other vehicles	Metal goods not elsewhere specified	Textiles	Leather, leather goods and fur	Clothing and footwear	Total bricks, pottery, glass, etc	Bricks, cement, etc	Pottery and glass	Timber, furniture, etc	Paper, printing and publishing	Other manufacturing industries
Weights	73	45	28	48	49	3	24	27	17	10	22	64	31
1971	100.2	100.5	99.7	93.3	100.6	103.0	105.4	108.4	107.0	110.5	103.0	97.3	99.8
1972	104.0	102.2	106.8	95.4	102.9	104.5	107.8	115.9	115.1	117.2	113.5	102.7	104.3
1973	107.6	104.6	112.6	102.9	108.6	101.4	114.6	126.6	123.8	131.1	132.6	112.1	116.7
1974	103.0	95.5	115.2	103.6	99.2	96.3	112.2	117.1	108.3	130.9	112.1	108.9	114.5
1975	95.3	87.8	107.6	95.0	93.8	98.3	112.2	107.9	99.7	120.8	110.2	95.6	105.5
1976	91.9	89.4	96.0	93.9	97.4	102.1	111.0	111.2	101.9	125.7	112.6	98.1	114.7
1977	93.3	94.6	91.1	98.8	93.7	98.0	117.8	108.9	95.8	129.3	105.4	102.2	120.8
1977													
1st qtr	92.6	94.0	90.4	99.1	98.7	104.7	117.2	109.4	96.4	129.9	109.4	103.1	123.0
2nd	94.2	96.1	91.1	97.5	92.5	95.8	116.6	107.9	94.1	129.4	100.9	101.3	118.6
3rd	92.8	93.3	91.9	99.2	92.7	95.6	117.9	110.4	95.6	133.4	104.6	101.5	120.7
4th	93.5	95.1	90.8	99.4	90.9	95.8	119.4	107.9	97.3	124.5	106.7	102.9	120.9
1978													
1st qtr	94.0	96.8	89.4	100.6	91.5	92.1	117.7	106.6	94.2	126.0	102.5	101.3	120.4
2nd	91.6	94.0	87.7	100.1	93.6	91.1	116.0	111.0	93.9	137.7	103.7	101.3	118.4
1977													
Jun	88	88	89	94	90	96	115	105	93	124	96	100	114
Jul	96	98	93	101	95	96	118	110	93	136	104	101	121
Aug	90	89	91	101	91	96	117	109	97	129	105	103	123
Sep	92	93	92	96	92	96	119	112	97	134	104	101	118
Oct	94	95	93	98	93	96	119	107	94	126	107	102	121
Nov	91	91	91	98	90	96	114	108	97	126	103	103	123
Dec	96	100	89	102	90	96	125	109	100	122	110	104	118
1978													
Jan	96	100	89	101	92	92	116	107	94	128	101	100	122
Feb	92	93	91	100	92	92	117	106	93	125	103	102	122
Mar	94	98	88	101	90	92	121	107	96	124	103	102	118
Apr	96	101	89	103	98	91	121	111	96	134	109	101	120
May	90	92	87	97	93	91	111	110	93	137	100	100	115
Jun	88	89	87	100	90	91	116	112	93	143	102	103	120
Percentage change latest three months on:													
1. previous three months	−2.5	−2.9	−1.9	−0.6	2.2	−1.1	−1.4	4.1	−0.3	9.3	1.2	0.0	−1.7
2. a year earlier	−2.8	−2.2	−3.8	2.6	1.2	−4.9	−0.5	2.9	−0.2	6.4	2.8	0.0	−0.2

p Provisional.

Hosiery and other knitted goods: index of production in May

In the three months ended May 1978 the volume of production of hosiery and other knitted goods, seasonally adjusted (including knitted fabrics), was provisionally estimated to have been 1 per cent lower than in the three months ended May 1977.

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years. The actual figures allow for differences in the length of calendar months, but not for other seasonal variations.

Inquiries: 01-212 0017 or 01-212 6474.

Hosiery and other knitted goods, including warp knitting

1970 = 100

1968	88	
1969	98	
1970	100	
1971	99	
1972	99	
1973	103	
1974	100	
1975	96	
1976	101	
1977 p	101	
	Actual	Seasonally adjusted
1976		
1st qtr	90	97
2nd	95	98
3rd	101	105
4th	118	105
1977		
1st qtr	94	101
2nd	94	96
3rd	100	103
4th p	114	102
1978		
1st qtr p	95	103
1977		
January	92	107
February	96	101
March	94	95
April	91	99
May	96	97
June	95	93
July	93	107
August	93	100
September	114	103
October p	126	100
November p	119	97
December p	98	109
1978		
January p	84	98
February p	96	101
March p	89	94
April p	96	100
May p	89	94

p Provisional.

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Index of retail prices for July

The index of retail prices for all items for 18 July was 198.1 (15 January 1974 =100). This represents an increase of 0.5 per cent on June (197.2) and of 7.8 per cent on July 1977 (183.8).

The rise in the index in July was due mainly to increased mortgage interest payments; to increases in the prices of cars and some foods, particularly meat and fruit; to increases in some bus and rail fares; and to increases in average charges for electricity and for canteen and restaurant meals. These increases were partially offset by lower prices for potatoes and tomatoes.

The movements for the main groups in the index are shown in table 2.

Prices secretary Roy Hattersley comments . . .

'The figures for the July retail price index are well in line with the prediction I made in May that inflation would remain around 8 per cent for the rest of the year, with small fluctuations from month to month.

'The small rise in the annual rate this month was largely due to the fact that last July's exceptionally low increase of 0.1 per cent has now dropped out of the 12-month comparison. However, this July's increase of 0.5 per cent is the smallest monthly increase this year.'

Table 1 Index of retail prices

	All items				All items except seasonal foods		
	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months	12 months	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months
1978							
February	190.6	+0.6	+3.2	+9.5	191.4	+0.6	+3.5
March	191.8	+0.6	+3.3	+9.1	192.4	+0.5	+3.3
April	194.6	+1.5	+4.3	+7.9	195.0	+1.4	+4.1
May	195.7	+0.6	+4.4	+7.7	196.1	+0.6	+4.2
June	197.2	+0.8	+4.7	+7.4	197.2	+0.6	+4.3
July	198.1	+0.5	+4.5	+7.8	198.7	+0.8	+4.5

Table 2 Index of retail prices: commodity breakdown

	Indices (15 Jan 1974 = 100)		Percentage change over the month
	13 June 1978	18 July 1978	
All items	197.2	198.1	+0.5
All items excluding food	194.5	195.9	+0.7
Food	206.7	206.1	−0.3
Seasonal food	200.8	185.5	−7.6
Other food	207.9	210.0	+1.0
Alcoholic drink	196.6	197.5	+0.5
Tobacco	224.2	224.2	+0.0
Housing	172.1	174.1	+1.2
Fuel and light	228.9	230.6	+0.7
Durable household goods	181.7	181.8	+0.1
Clothing and footwear	170.3	170.9	+0.4
Transport and vehicles	206.3	207.9	+0.8
Miscellaneous goods	205.2	207.9	+1.3
Services	191.2	191.8	+0.3
Meals out	206.7	208.9	+1.1

Notes

1 The retail prices index measures the change from month to month in the average level of prices of goods and services purchased by most households in the United Kingdom. The expenditure pattern on which the index is based is revised each year using information from the family expenditure survey. The expenditure of certain higher income households and households of retired people dependent mainly on social security benefits is excluded.

2 The index covers a large and representative selection of nearly 350 separate goods and services, for which price movements are regularly measured in 200 towns throughout the country. Approximately 150 000 separate price quotations are used each month in compiling the index.

3 Seasonal variations in the index of retail prices are due largely to a very few items of 'seasonal food' that is, those items of food the prices of which show significant seasonal variations. These items account for less than five per cent of total retail expenditure. If the variation caused by these items is removed, the underlying trend of the figures can be seen more clearly.

4 Rates of change of indices can be calculated over periods of any length. However, rates calculated over periods as long as twelve months are slow to detect changes in trend, while calculations over periods as short as three months give rather volatile results. To help in assessing trends, rates of changes in the all items index and the index for all items except seasonal food are shown in table 1 over successive periods of six months.

5 The index is given in full in the *Department of Employment Gazette*.

Inquiries: Watford 28500 ext. 630.

Back pay lifts June earnings

Average earnings of employees in Great Britain are estimated to have risen by 15.4 per cent between June 1977 and June 1978. This estimate is based on the monthly index for the whole economy, covering about 21 million employees, which was introduced from January 1976 (see table 1).

In the production and certain other industries (transport and communication, other (across sea) transport and postal services, and some miscellaneous services), employing about 11 million employees and covered by the older series index introduced from January 1963, earnings increased by about 16.5 per cent over the 12 months to June (see table 2).

Table 1 Index of average earnings of employees in Great Britain

Whole economy (new) series, not seasonally adjusted

	Index Jan 1976 = 100	Percentage increase over 12 months
1977		
May	114.9	9.0
June	115.4	8.2
July	116.2	8.1
August	115.7	7.3
September	116.6	7.7
October	117.9	8.7
November	120.1	8.6
December	121.7	9.4
1978		
January	121.5	9.5
February	122.7	10.5
March	125.0	10.4
April	127.2	12.4
May	129.4	12.6
June p	133.1	15.4

p Provisional.

The Department of Employment points out that the June figures were affected by substantial back payments to non-industrial civil servants, national health service workers, teachers, air transport workers and workers in the gas and electricity supply industries. Exclusion of the back pay would reduce the figure in the whole economy (new) series to 14.25 per cent and in the older series index to 15.75 per cent.

In the 11 months of phase three to the end of June, the increase in the new series index is 14.5 per cent (13.25 per cent if back pay is excluded) and, in the older series, the increase is 16.6 per cent (15.75 per cent without back pay). After this rash of back payments the department expects the July figures to level out, bringing the earnings outturn for the 12 months of phase three into line with the Chancellor of the Exchequer's forecast of about 14 per cent.

Table 2 Index of average earnings in production industries and some services [1]

Older series

	Seasonally adjusted			Unadjusted index January 1970 = 100
	Index January 1970 = 100	Percentage increase Over previous month	Over previous 12 months	
1977				
November	300.5	1.6	10.3	304.5
December	304.8	1.4	10.6	304.8
1978				
January	306.3	0.5	10.2	306.5
February	311.2	1.6	11.5	311.0
March	314.8	1.2	11.2	317.3
April	325.7	3.4	14.8	325.9
May	327.2	0.4	14.5	330.9
June p	333.8	2.0	16.5	336.5

p Provisional.

[1] Transport and communication (other than sea transport and postal services) and some miscellaneous services.

Indices of basic rates of wages

At the end of July 1978, nationally negotiated basic weekly rates of wages of manual workers were on average 15.1 per cent higher than a year earlier. During July, the index of basic weekly rates increased from 262.3 to 262.6. Recent figures are:

	Indices, 31 July 1972 = 100		Percentage increases over previous 12 months	
	Basic weekly rates	Basic hourly rates	Basic weekly rates	Basic hourly rates
1978				
28 February	237.7	239.2	6.3	6.3
31 March	238.6	240.0	6.5	6.5
30 April	258.2	259.8	14.9	14.9
31 May	259.2	260.8	14.9	14.9
30 June	262.3	263.9	15.4	15.4
31 July	262.6	264.2	15.1	15.1

The indices only take account of changes in nationally negotiated rates. The year-on-year increases consequently reflect that new national rates for engineering workers became effective in April 1978 after remaining unchanged from February 1976.

Inquiries: Watford 28500 ext. 319

Turnover of the motor trades: second quarter

Turnover of the motor trades in the second quarter of 1978 was 26 per cent higher than in the second quarter of 1977. On the same comparison, new vehicle sales increased by 40 per cent, used vehicle sales increased by 32 per cent and other sales and receipts (which include sales of petrol and oil, tyres, spares and accessories and receipts from servicing and repairs) rose by 14 per cent.

The statistics are of turnover at current prices. Movements therefore include the effect of price changes, including changes in purchase tax before the second quarter of 1973, the introduction of VAT and car tax from the second quarter of 1973, the introduction of VAT on petrol from the second quarter of 1974, and subsequent changes in the rates of VAT. The turnover includes transactions between dealers in addition to final sales. Vehicles include commercial vehicles as well as private cars and motor cycles.

The estimates for the first quarter have been revised to take account of additional information from late returns.

The figures are not seasonally adjusted.

The returns made by a voluntary panel are used to project the figures of turnover in a base year (1972) obtained in a comprehensive inquiry to motor traders.

Inquiries: 01-215 3177.

Turnover of the motor trades: index numbers

Index numbers of turnover per quarter at current prices (including purchase tax or VAT and car tax)

Percentage change compared with a year earlier in brackets — 1972 = 100

	Total turnover	New vehicle sales	Used vehicle sales	Other sales
Turnover in 1972 (£ million)	(8 109)	(3 089)	(1 373)	(3 647)
1972	100	100	100	100
1973	111 (+11)	110 (+10)	102 (+2)	115 (+15)
1974	119 (+7)	106 (−3)	100 (−2)	137 (+19)
1975	143 (+20)	123 (+16)	128 (+28)	166 (+21)
1976	174 (+22)	159 (+29)	158 (+24)	192 (+16)
1977	212 (+22)	202 (+27)	195 (+23)	228 (+18)
1972				
1st qtr	95	94	100	93
2nd	105	109	107	101
3rd	102	101	103	104
4th	98	96	90	102
1973				
1st qtr	117 (+23)	126 (+34)	119 (+18)	109 (+17)
2nd	110 (+5)	110 (+1)	103 (−3)	113 (+12)
3rd	114 (+12)	111 (+10)	108 (+5)	119 (+15)
4th	102 (+4)	93 (−3)	80 (−12)	118 (+16)
1974				
1st qtr	108 (−8)	102 (−20)	87 (−27)	120 (+10)
2nd	122 (+11)	112 (+2)	106 (+3)	136 (+20)
3rd	126 (+11)	110 (−1)	111 (+3)	146 (+22)
4th	121 (+18)	102 (+10)	95 (+20)	147 (+24)
1975				
1st qtr	137 (+27)	127 (+25)	116 (+33)	152 (+27)
2nd	148 (+21)	129 (+15)	136 (+27)	168 (+23)
3rd	152 (+21)	131 (+19)	143 (+29)	174 (+19)
4th	135 (+12)	105 (+3)	117 (+23)	168 (+15)
1976				
1st qtr	166 (+22)	161 (+27)	153 (+32)	175 (+15)
2nd	176 (+19)	162 (+25)	170 (+26)	189 (+12)
3rd	178 (+17)	159 (+22)	167 (+17)	199 (+15)
4th	176 (+30)	155 (+48)	143 (+22)	205 (+22)
1977				
1st qtr	203 (+22)	199 (+23)	189 (+24)	211 (+21)
2nd	210 (+20)	197 (+22)	196 (+15)	226 (+19)
3rd	230 (+29)	220 (+39)	215 (+29)	243 (+22)
4th	207 (+18)	191 (+23)	179 (+25)	230 (+12)
1978				
1st qtr (revised)	257 (+27)	289 (+45)	233 (+23)	240 (+14)
2nd	265 (+26)	276 (+40)	260 (+32)	258 (+14)

Sectoral assistance under section 8 of the Industry Act 1972

Offers of sectoral assistance amounting to £5,000 or more against which first payments were made to the companies concerned in the period 1 April to 30 June 1978 are shown below. This information amends material published in *Trade and Industry*, 18 August, pages 410-411.

Inquiries: 01-211 3931.

Area and company	Amount of assistance committed (£)
Clothing industry scheme	
North West	
Bairdwear Ltd	7 000
O. L. Schultz Ltd	45 327
Eagle Manufacturing Ltd	6 250
Henri Lloyd Ltd	5 241
I. and M. Kindler Ltd	9 750
Rosenda (Blackburn) Ltd	8 863
Bentwood Brothers Ltd	22 772
Norman Nicholls Ltd	10 037
Peter Blond Ltd	17 825
Peter Blond Ltd	13 299
Henry Bannerman (Holdings) Ltd	25 875
Eclipse Clothing Ltd	5 850
Eclipse Clothing Ltd	12 093
East Midlands	
Wallis and Linnell Ltd	44 218
Wallis and Linnell Ltd	10 029
James Smith and Co (Derby) Ltd	12 948
Meritina Ltd	176 463
Strodex Ltd	6 100
Courtaulds Knitwear Ltd	29 784
Yorkshire and Humberside	
Maitland Menswear Ltd	8 700
Super Suits Ltd	24 598
Sumrie Clothes Ltd	7 660
Super Suits Ltd	63 413
George A. Hurley Ltd	6 864
Derwest Jennings Ltd	13 475
Derwest Jennings Ltd	45 775
South East	
L. S. and J. Sussman Ltd	16 777
A. E. Gray and Co Ltd	6 012
E. Brown (Leathers) Ltd	35 453
Anderson (Stoke Newington) Ltd	22 359
Snowman Ltd	14 046
R. F. D. Mills Equipment Ltd	5 515
Northern	
Tyne Textiles Ltd	8 235
N. Hyer Ltd	38 926
H. Edgard and Sons Ltd	7 370
Pawsons Washington Ltd	87 139
Northern Ireland	
Lincroft Kilgour Ltd	17 825
Magee and Co Ltd	11 500
Burlington (Saville Row) Shirts Ltd	41 250
West Midlands	
Briggs, Jones and Gibson Ltd	12 859
Staffordshire Sportswear Ltd	10 804
Bladen Brothers Ltd	11 616
Eastern	
Aquascutum Mnfgs Ltd	9 660
Tower Uniform Headdress Ltd	10 125
Scotland	
S. and J. Harris Ltd	9 400
Glazin and Berry Ltd	31 750
Wales	
Del Guerra Ltd	11 529
Covering more than one region	
Steinberg and Sons Ltd	64 568
B. Foster and Co Ltd	24 100
Machine tool industry scheme	
Scotland	
Hamilton Tool and Gauge Co Ltd	22 396
Hugh Smith (Glasgow) Ltd	38 275
Yorkshire and Humberside	
C. J. Porter (Lincs) Ltd	8 311
Staveley Machine Tools Ltd	413 070
North West	
Ashton Jig and Tool Co Ltd	10 836
W. R. Anderton and Co Ltd	65 560
Staveley Machine Tools Ltd	230 230
Toolmak Ltd	10 954
West Midlands	
Graymaur Tooling Co Ltd	6 761
John Marshall Engineers Ltd	56 487
Stuart Davis Machines Ltd	9 180
East Midlands	
Ex-Cell-0 Corporation (England) Ltd	368 525
Adcock-Shipley Division of Textron Ltd	346 250
South West	
Altus Engineering Co (Corsham) Ltd	34 447
Excel Extrusion Die Co Ltd	16 000
Eastern	
Agemaspark Ltd	176 563
Algram Engineering Co Ltd	11 119
Staveley Machine Tools Ltd	108 150
London and South East	
H. P. C. Engineering Ltd	121 306
Mosercams Ltd	9 000
Staveley Machine Tools Ltd	118 190
Walton Jigs and Tools Ltd	26 150
Textile machinery industry scheme	
North West	
Platt Saco Lowell Ltd	1 135 000

Films and television material: overseas transactions in 1977

This article presents the results of the Department of Trade's annual inquiry into overseas transactions by film and television companies relating to the production and exhibition of cinematograph film and television material in 1977. The scope and coverage of the inquiry were indentical with those of previous inquiries in the series, the last of which was reported in *Trade and Industry*, 26 August 1977.

Net receipts increase sharply to £29 million

Receipts from overseas, net of overseas expenditure, of film and television companies from the production and exhibition of cinematograph film and television material increased sharply from £7 million in 1976 to £29 million in 1977. Receipts rose by £20 million between 1976 and 1977 to £74 million mainly because television companies almost doubled their receipts. Expenditure overseas on the other hand fell slightly by £2 million to £45 million in 1977 with both film and television companies contributing to the decline.

Film companies

Overseas receipts of film companies from the production and distribution of cinematograph film increased by only £2½ million between 1976 and 1977, due entirely to an increase in receipts from overseas performances. Overseas expenditure by these companies fell by just over £1 million in 1977 because of a fall in overseas expenditure on the production of films. A broad geographical analysis of film companies' overseas transactions from 1973 to 1977 is given in table 2, with table 3 providing a division between those for performances and those for production for each area in 1976 and 1977. North American receipts fell by £2½ million in 1977, mainly due to a fall in production receipts, but this was more than offset by increases in receipts from the other areas. On the other hand, expenditure in north America rose by £3 million, due entirely to higher expenditure for performances, but this was more than offset by falls in expenditure in each of the other areas.

The increase in film company receipts and the drop in expenditure was entirely by UK companies which were not subsidiaries of the major United States film companies. As table 4 shows, the UK subsidiaries of United States companies had lower receipts in 1977 than 1976 and higher expenditure. In the early 1970s such subsidiaries accounted for two-thirds of UK film companies receipts, but by 1977 this had fallen to just over a quarter. The proportion of overseas expenditure by film companies accounted for by these subsidiaries, however, was just over 70 per cent in 1977 compared with 80 per cent in the early 1970s.

Television companies

Overseas receipts of television companies nearly doubled between 1976 and 1977 to £35½ million, mainly because, as shown in table 5, receipts from north America increased from £7½ million in 1976 to £20 million in 1977. Receipts from the other main areas also increased in 1977. Overseas expenditure by television companies in 1977 was just over £½ million lower than in 1976, mainly as a result of lower expenditure in north America. Transactions with north America, the most important area for television companies, accounted for just over half of both receipts and expenditure in 1977 compared with just over 60 per cent reached in the early 1970s.

Notes and definitions

The statistics cover the value of transactions between the United Kingdom and overseas residents in respect of the production and performance in cinemas or on television of films of any width and recordings on tape or any other

Table 1 Overseas transactions in respect of film and television material £ million

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
Expenditure[1]											
Film companies[2]	21.2	21.4	26.8	15.3	19.4	20.0	20.9	22.1	27.8	29.6	28.3
Television companies[3]	3.5	4.1	5.2	4.8	4.9	5.0	7.7	9.1	10.8	17.6	16.9
Total	24.7	25.5	32.0	20.1	24.3	25.0	28.6	31.2	38.6	47.2	45.2
Receipts[4]											
Film companies[2]	45.3	44.5	40.7	26.7	34.0	28.4	22.8	22.5	32.5	35.7	38.3
Television companies[3]	6.2	5.1	6.9	5.7	10.6	9.1	10.1	10.4	12.6	18.4	35.7
Total	51.5	49.6	47.6	32.4	44.6	37.5	32.9	32.9	45.1	54.1	74.0
Receipts less expenditure											
Film companies[2]	24.1	23.1	13.9	11.4	14.6	8.4	1.9	0.4	4.7	6.1	10.0
Television companies[3]	2.7	1.0	1.7	0.9	5.7	4.1	2.4	1.3	1.8	0.8	18.8
Total	26.8	24.1	15.6	12.3	20.3	12.5	4.3	1.7	6.5	6.9	28.8

[1] Sums payable to overseas residents
[2] Includes transactions by film companies in respect of rights restricted to television.
[3] Includes transactions in respect of BBC sound broadcasting and Independent Television News.
[4] Sums receivable from overseas residents.

Table 2 Overseas transactions in respect of film companies[2]: analysis by area £ million

	1973	1974	1975	1976	1977
Expenditure[1]					
Overseas sterling countries[5]	0.6	0.9	2.3	1.1	1.0
European Economic Community[5]	4.3	5.9	5.4	8.9	6.8
Other western Europe	0.7	1.0	1.5	2.8	2.0
North America	15.0	13.5	16.9	14.9	17.8
Rest of the world	0.3	0.8	1.7	1.9	0.7
Total	20.9	22.1	27.8	29.6	28.3
Receipts[4]					
Overseas sterling countries[5]	4.0	4.9	6.5	6.5	8.5
European Economic Community[5]	3.3	4.5	5.6	7.7	8.5
Other western Europe	1.6	2.1	1.8	2.3	3.8
North America	11.4	8.6	16.2	14.0	11.6
Rest of the world	2.5	2.4	2.4	5.2	5.9
Total	22.8	22.5	32.5	35.7	38.3
of which receipts in respect of rights restricted to television	1.8	1.7	1.6	3.0	3.6

[1] [2] [4] See table 1.
[5] Transactions with Irish Republic included in European Economic Community.

Table 3 Overseas transactions in respect of film companies[2]: analysis by area and type of transaction £ million

	1976						1977					
	Total	Overseas sterling countries	European Economic Community	Other western Europe	North America	Rest of world	Total	Overseas sterling countries	European Economic Community	Other western Europe	North America	Rest of world
Expenditure[1]												
Performances in cinemas or on television	21.2	0.1	7.6	1.1	12.3	0.1	22.8	0.3	5.9	0.2	16.4	—
Production of films	8.4	1.0	1.3	1.7	2.6	1.8	5.5	0.7	0.9	1.8	1.4	0.7
Total	29.6	1.1	8.9	2.8	14.9	1.9	28.3	1.0	6.8	2.0	17.8	0.7
Receipts[4]												
Performances in cinemas or on television	24.2	5.7	7.1	1.8	5.7	3.9	27.4	7.6	7.5	3.2	5.3	3.8
Production of films	11.5	0.8	0.6	0.5	8.3	1.3	10.9	0.9	1.0	0.6	6.3	2.1
Total	35.7	6.5	7.7	2.3	14.0	5.2	38.3	8.5	8.5	3.8	11.6	5.9

Notes: See tables 1 and 2.

media. Performances in cinemas or on television include the outright sales or purchases of films as well as receipts or payments for rentals. Production of films includes overseas receipts or payments for film processing, printing, editing etc., as well as sums for work on location. The returns from film companies include any overseas transactions they do on behalf of another producer, distributor or agent in the United Kingdom.

The statistics do not cover all the film companies' overseas transactions which affect the UK balance of payments since they do not include profits or capital transactions (except the provision of production finance). Transactions relating to the Army Kinema Corporation are excluded throughout. The basis of the register of the inquiry was described in detail in the *Board of Trade Journal*, 6 January 1967. This register is brought up to date annually using a list of producers and distributors who registered films with the Department of Trade. Returns in respect of 1977 were received from 168 film companies, of which 55 reported no overseas transactions. Firms were asked to report figures for the calendar year 1977 where possible, although some firms provided figures for their nearest accounting year. Eleven firms reported for an accounting year ending before 31 December 1977 and three companies for an accounting year ending after 31 December 1977.

Firms were asked to return amounts against the geographical area to which they were payable or from which they were receivable, irrespective of where they might have first been earned.

Transactions with overseas branches and with companies registered abroad were included, as were debits to and credits from non-resident accounts. Receipts for production in the UK comprised amounts remitted from overseas or put up from amounts held in the UK on behalf of overseas residents, and sums applied to the repayment of loans raised in the UK. Amounts for film production, including location work abroad, remitted from the UK or put up from amounts held overseas on behalf of UK residents, were included as debits.

Firms were asked to state separately the amounts receivable in respect of rights relating solely to television (see table 2); the corresponding payments for foreign films for television showing are thought to be small.

The figures reported by companies in this inquiry include some imports and exports of exposed cinematograph film recorded in the overseas trade accounts. However, the trade account figures for exposed cinematograph film include a number of items not covered by the inquiry, such as film flown in from units on location abroad for processing and immediate return to the unit abroad, and film imported and prints exported after processing by specialist film processing laboratories to the order of overseas customers. It is not possible to give an exact indication of the extent of the overlap, but the inquiry results probably include about half of the export figure in the overseas trade account and a rather higher proportion of the import figures. Excluding these imports and exports covered by the trade accounts, it is estimated that transactions by film and television companies contributed a net surplus of £22 million to the invisible account of the balance of payments in 1977 compared with a net surplus of £1 million in 1976.

General

The tables give the information in as much detail as is practicable without disclosing the affairs of individual firms.

In the tables:

– means nil or less than half of final digit shown

.. means not available.

Inquiries: 01-215 3409

Films Act 1960: combination of quota periods

Saturday Night Fever

The Department of Trade, after consulting the Cinematograph Films Council and upon the application of EMI Cinemas Ltd, has issued a direction that "for the following cinemas" the years 1978 and 1979 may be combined as a single quota period, provided that the foreign film 'Saturday Night Fever' is exhibited for a continuous period of at least eight weeks and one day:

ABC 3 Cinema, Bristol Road, Birmingham.
Victoria 2 Cinema, Cambridge.

Cinema admissions and takings in May

During May, counted as a four-week period, the weekly average of admissions to cinemas in Great Britain was 2.13 million and the weekly average of gross box-office takings was £2.07 million. The comparable figures for May 1977 were 1.64 million and £1.34 million.

Cinema admissions and takings in 1977

Results of the annual cinema exhibitors' inquiry, to be published shortly as a Business Monitor, show that in 1977 there were 1562 cinemas licensed at the end of the year for public performances, each screen in multiple units being counted separately. The total number of admissions and gross box-office takings for all public cinemas operating during the year are estimated to have been 107 million and £89 million. Admissions were about the same as in 1976 while takings increased by over 12 per cent.

The remainder of the monitor deals with cinemas open either at the end of the year or for at least 26 weeks during the year and not permanently closed at the end of the year. For these cinemas (1510 in number) total admissions were about the same as in 1976 at 103.5 million and takings amounted to £85.5 million, an increase of 13 per cent; payments to the British film fund, levied according to takings, increased from £4.8 million in 1976 to £5.4 million, while payments for film hire rose by 10 per cent to £26.8 million. The average admission charge increased from 73p in 1976 to 82.7p

Table 4 Overseas transactions in respect of film companies[2]: analysis by type of transaction and category of company

£ million

	1976			1977		
	All firms	United Kingdom subsidiaries of the major United States film companies	Other firms	All firms	United Kingdom subsidiaries of the major United States film companies	Other firms
Expenditure [1]:						
Performances in cinemas or on television	21.2	18.3	2.9	22.8	19.7	3.1
Production of films, etc	8.4	0.5	7.9	5.5	0.4	5.1
Total	29.6	18.8	10.8	28.3	20.1	8.2
Receipts [1]:						
Performances in cinemas or on television	24.2	7.2	17.0	27.4	6.2	21.2
Production of films, etc	11.5	4.8	6.7	10.9	4.3	6.6
Total	35.7	12.0	23.7	38.3	10.5	27.8

Notes: See table 1.

Table 5 Overseas transactions of the BBC and IBA programme contractors[3]: analysis by area

£ million

	1976						1977					
	Total	Overseas sterling countries	European Economic Community	Other western Europe	North America	Rest of world	Total	Overseas sterling countries	European Economic Community	Other western Europe	North America	Rest of world
Expenditure[1]	17.6	0.7	4.5	0.9	10.4	1.1	16.9	1.0	4.8	1.2	9.2	0.7
Receipts[4]	18.4	4.2	3.8	1.5	7.6	1.3	35.7	6.4	5.2	2.2	20.0	1.9

Notes: See tables 1 and 2.

Cinema admissions and takings in 1977
continued

in 1977; total employment fell from18 443 to 17 154.

The Business Monitor also provides analyses by region, seating capacity, size of box-office takings and type of cinema (single, twin etc).

The results of a parallel inquiry into receipts from film distribution, also published in the Business Monitor, show that receipts from distribution for cinema, television and other performances were £35.5 million in 1977, 10 per cent greater than in 1976.

Business Monitor M2 – '1977: Cinemas', will be available on subscription shortly through HMSO.
Inquiries: 01-215 5347.

	1972	1973	1974	1975	1976	1977
Number of licensed public cinemas at end of year	1 519	1 580	1 588	1 590	1 583	1 562 [6]
Estimated total admissions during year [2]: millions	163	142	143	124	107	107
Estimated gross box office takings during year [1, 2]: £m	62	62	70	76	79	89
Details for cinemas reporting in annual inquiry [3]						
Number of cinemas	1 450	1 530	1 535	1 530	1 525	1 510
Seating capacity: thousands	1 198	1 097	973	879	827	764
Admissions: millions	156.6	134.2	138.5	116.3	103.9	103.5
Gross box-office takings: £m [1]	59.4	58.0	69.3	71.2	75.8	85.5
Payments to British film fund: £m	4.2	3.7	4.4	4.9	4.8	5.4
Payments for film hire: £m	19.0	16.4	20.3	21.4	24.3	26.8
Average charge for admission: new pence	37.9	43.2	50.1	61.2	73.0	82.7
Number of persons employed: full-time [4]	10 543	9 278	8 232	7 618	7 183	6 658
part-time	12 866	11 980	12 027	11 822	11 260	10 496

[1] VAT is included in the gross box office takings. [2] These estimates include the contribution of cinemas which were not open at the end of the year, but which were open for part of the year, eg cinemas exhibiting on a seasonal or occasional basis, cinemas closing permanently or temporarily before the end of the year. They are based on four-weekly returns by cinemas for film levy purposes and include rough estimates for smaller cinemas not subject to levy. These returns are combined to produce estimates for consecutive periods of 52 weeks; in 1975 a 53-week period was covered to keep in step with the calendar year. [3] This includes cinemas open at the end of the year and also those open for 26 weeks or more during the year but temporarily closed at the end of the year. The estimates are for calendar years but an alternative reporting period of 52 weeks is accepted; in 1974 the alternative period covered 53 weeks. [4] Employees normally working more than 30 hours per week. [5] The total number of screens licensed during the year was 1636; this includes a small number at which no public performances were given.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 18 August 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Movietone News 2567	BR/E 39591/20/8/83	8	18 August	British Movietonews Ltd	British Movietonews Ltd
COMMUNITY					
Archisexe	EC 39708/20/8/83	80	18 August	Watchgrove Ltd	Films de Marc Univers Galaxie Paris and Cetelci, Brussels
FOREIGN					
China Girl	F 39705	62	17 August	Cinecenta Film Distributors Ltd	Summer Brown Production, Hollywood
FM	F 39706	105	17 August	Cinema International Corporation (UK)	Universal Pictures, California
The Great White Heron	F 39707	40	17 August	Children's Film Foundation Ltd	Film Bulgaria, Export Import, Sofia
Cria Cuervos	F 39709	110	18 August	Gala Film Distributors Ltd	Emiliano Piedra Distribucion, Madrid
The Silent Flute	F 39710	95	18 August	Rank Film Distributors Ltd	Volare Productions, California

Note. The title of the film 'Fist of Fury' F 39674 registered on 14 July 1978 should have read 'Fist of Fury Part II.'

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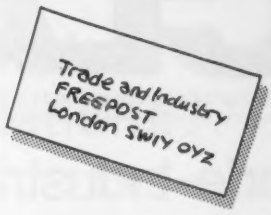

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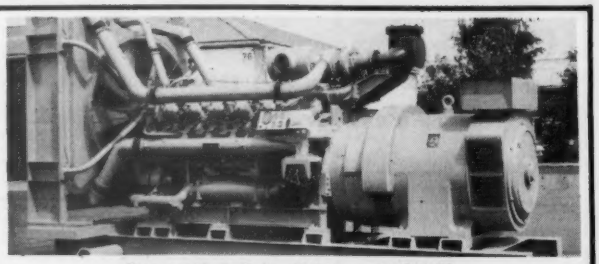

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